REPORT RESUMES

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AN ANALYSIS OF THE RATIONALE AND PROCEDURES FOR LONG-RANGE PLANNING --FOUND IN SELECTED CORPORATE ENTERPRISES, GOVERNMENT AGENCIES OR DEPARTMENTS, AND SCHOOL SYSTEMS--WHICH ARE APPROPRIATE FOR EDUCATIONAL AND ADMINISTRATIVE PLANNING IN LOCAL SCHOOL SYSTEMS.

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THIS STUDY REVIEWS SOME OF THE CURRENT PLANNING PRACTICES IN SCHOOL SYSTEMS WHICH ARE CONSIDERED TO BE ALREADY INVOLVED IN LONG-RANGE PLANNING, AND DESCRIBES FURTHER LONG-RANGE TECHNIQUES WHICH COULD BE ADAPTED FOR SCHOOL SYSTEMS FROM CURRENT CORPORATE AND GOVERNMENTAL PLANNING PROCEDURES. INDIVIDUAL INTERVIEWS WERE CONDUCTED WITH SELECTED MANAGEMENT (OR ADMINISTRATIVE) PERSONNEL IN CORPORATIONS, GOVERNMENT, AND SCHOOL SYSTEMS TO IDENTIFY THE SPECIFIC ELEMENTS OF A PLANNING PROGRAM APPROPRIATE FOR SCHOOL SYSTEMS. IN ADDITION, QUESTIONNAIRE RESPONSES FROM APPROXIMATELY 200 SCHOOL SYSTEMS WERE TABULATED, CATEGORIZED, AND ANALYZED. THE INTERVIEW INFORMATION WAS COMPARED WITH DATA FROM THE OTHER SOURCES AND SYNTHESIZED AS A BASIS FOR DESCRIBING A PROCESS OF LONG-RANGE PLANNING. RESULTS INDICATE THE NECESSITY FOR ORGANIZED LONG-RANGE PLANNING EFFORTS. NEITHER SYSTEMATIC LONG-RANGE PLANNING NOR A FORMALIZED STRUCTURE FOR INSURING AN EFFECTIVE PLANNING EFFORT ARE FOUND IN MOST SCHOOL SYSTEMS TODAY, BUT THERE IS A WILLINGNESS EVIDENT AMONG SCHOOL LEADERS TO SEEK MORE IMAGINATIVE APPROACHES TO PLANNING. FUTURE STUDIES AND PRACTICAL EXPERIMENTATION IN COOPERATIVE INTERACTION BETWEEN SCHOOLS AND CORPORATE AND GOVERNMENT ENTERPRISES ARE WARRANTED. (HW)

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January 1, 1968

U.S. DEPARTMENT OF HEALTH, EDUCATION & WELFARE
OFFICE OF EDUCATION

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Willard Adams Ruliffson

Teachers College, Columbia University

New York, N. Y.

January 1, 1968

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U. S. Department of

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Office of Education

Bureau of Research

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TEACHERS COLLEGE
COLUMBIA UNIVERSITY
New York, New York 10027

TO: Superintendent of Schools

SUBJECT: Questionnaire Study

An Analysis Of The Long-Range Planning Policies And Procedures In Selected School Systems

Increasingly, superintendents of schools across the country have shown interest in long-range planning concepts and procedures, and have requested guide-lines for such planning. The following questionnaire is part of an extensive study designed to identify critical elements of long-range planning for school systems. In addition to the analysis of questionnaires from approximately three hundred school systems in more than forty states, the project will also include a detailed interview study of long-range planning in selected school systems, corporate enterprises, and government agencies.

No individual school districts will be identified by name in the findings and research reports.

Please complete and return by March 30, 1966, to:

Willard A. Ruliffson
Teachers College, Columbia University
New York, New York 10027
c/o Dr. Norton L. Beach
Box 21

Enclosed you will find a stamped, self-addressed envelope in which to return the questionnaire.

Thank you.

Do you wish to receive a summary
of the questionnaire responses?

☐ Yes ☐ No

1. GENERAL INFORMATION

Name of School System ____________________

City, County, and State ____________________

1. Size of the community served by school system (check one)

☐ under 4,999
☐ 5,000 to 9,999
☐ 10,000 to 14,999
☐ 15,000 to 24,999
☐ 25,000 to 49,999
☐ 50,000 to 74,999
☐ 75,000 to 99,999
☐ 100,000 to 199,999
☐ 200,000 to 499,999
☐ 500,000 and above

Please indicate actual population if over 500,000 ____________________

2. School district enrollment

1964-65 ________
1965-66 ________
anticipated: 1966-67 ________

If available:
anticipated: 1970-71 ________
anticipated: 1975-76 ________

3. Grade levels included in district (such as K-14, K-12 or K-8, etc.) ____________________

4. Approximate per pupil expenditure (excluding capital outlay) ____________________
(current year)

5. Indicate the number of central (district-wide) administrative and supervisory personnel in each of the following categories: ("administrative and supervisory" here does not include psychologists, guidance personnel, or other pupil service specialists).

How Many

____ Chief School Administrator (Superintendent of Schools or similar position)
____ Deputy Superintendent or General Assistant Supt. (or similar position)
____ Assistant Superintendent for Curriculum or Instruction (or similar position)
____ Assistant Superintendent for Business (or similar position)
____ Assistant Superintendent for Personnel (or similar position)
____ Other Assistant Superintendents - specify ____________________
____ Administrative Assistant
____ Subject Supervisors or Curriculum Coordinators (do not include department chairmen)
____ Director of Personnel
____ Director of Elementary
____ Director of Secondary
____ Other central (district-wide) administrative or supervisory personnel -- specify:

BE SURE TO INCLUDE THE TITLES OF ANY POSITIONS SUCH AS THOSE HAVING TO DO WITH FEDERAL OR FOUNDATION PROJECTS OR INTER-DISTRICT COOPERATIVE PROGRAMS. WHERE POSITIONS ARE OF A TEMPORARY NATURE, PLEASE INDICATE THIS.

____

____

____ = TOTAL central (district-wide) administrative and supervisory personnel

II. PLANNING INFORMATION (PART A.)

PLEASE NOTE!

This study distinguishes between Long-Range Objectives and Long-Range Plans.

Long-range objectives, as used in this study, are defined as general goals or aims serving as guides for a school division, function or subject.

Long-range plans, as used in this study, are defined as the detailed procedures and actions which have been identified as the means for achieving the objectives. Planning may take various forms and is known by many different names. Please consider those activities in your district which may not be labeled as long-range objectives or long-range plans, but which nevertheless amount to the same thing. Examples of such activities might include:

1. Periodic revision of subject area curricula.
2. Textbook replacement studies and schedules.
3. Equipment and facility replacement studies.
4. Scheduled summer training or workshop programs, and long-range in-service activities.
5. Systematic development of a new educational program.
6. An educational service or project developed cooperatively between the local district and the State Department of Public Instruction (or similar agency for your state).
7. Planning for a federal grant, a foundation grant, or similar project.

Long-range, as used here, refers to objectives and/or plans for more than one year ahead.

Please check the areas in which you have long-range objectives and/or long-range plans (see definitions above) and indicate how many years the long-range plans cover.

Column A	Column B			Column C		Column D
Areas Having Objectives and/or Plans (Blanks are provided for you to add other areas at the end of this list)	General Long-Range Objectives?			Detailed Long-Range Plans?		Long-Range Plans for How Many Years?
	Yes	No	Written?	Yes	No	
1. Development of General School District Policies						
2. In-Service and Professional Growth for Administrative and Supervisory Staff						
3. Cooperative Planning With Neighboring School Districts						
4. Cooperative Planning With Lay Citizens						
5. School Organization (regarding the grouping of grades)						
6. Salary Planning						
7. Study of Long-Range Professional Personnel Needs						

Column A	Column B			Column C		Column D
Areas Having Objectives and/or Plans	General Long-Range Objectives?			Detailed Long-Range Plans?		Long-Range Plans for How Many Years?
	Yes	No	Written?	Yes	No	
8. Budgeting and Financial Planning						
9. Pupil Enrollment Projections						
10. Per Pupil Cost Projections						
11. School Plant Planning						
12. Replacement and Procurement of Materials and Equipment						
13. Teacher In-Service and Professional Growth						
14. Psychological Services and Guidance Program						
15. Standardized Testing Program						
16. Replacement of Textbooks						
17. Meeting the Needs of Different Kinds of Students Within the School						
18. Adult Education						
19. Vocational Education						
20. Innovating Methods of Teaching (e.g. learning labs, dial systems, etc.)						
CURRICULUM (List major curriculum areas for which Objectives and/or Plans have been developed and check appropriate column to the right.)						
21.						
22.						
23.						
24.						
25.						
OTHER AREAS IN WHICH YOU HAVE LONG-RANGE OBJECTIVES AND/OR PLANS						
26.						
27.						
28.						
29.						
30.						

/If more space is needed please use page 8./

II. (PART B.)

Check those studies and types of information which you have used as background for developing objectives and/or plans. These studies may not necessarily have been developed by school staff members, but may be studies which you have used from various sources.

Studies of:

1. ☐ recent developments in the teaching of various subject disciplines.
2. ☐ new educational programs for the disadvantaged.
3. ☐ innovations in educational facility and plant designs.
4. ☐ techniques for the school system budget-building process.
5. ☐ possible financial assistance from foundations, federal programs, etc.
6. ☐ community's wealth (capacity to pay for schools, community services, etc.).
7. ☐ community population growth.
8. ☐ community economic growth.
9. ☐ regional or national economic growth.
10. ☐ regional or national manpower data.
11. ☐ trends in surrounding districts (economic, tax levels, racial, housing, etc.).
12. ☐ community zoning policies and land use projections.
13. ☐ rate of turnover among residents of various neighborhoods.
14. ☐ age of neighorhoods in the community.
15. ☐ socio-economic level of in-coming residents to the community.
16. ☐ ethnic backgrounds of in-coming residents.
17. ☐ community integration plans.
18. ☐ school district integration plans.

OTHERS

19. ☐ ______________________________
20. ☐ ______________________________

III. WHO PLANS?

1. What group (or groups) develop and/or coordinate long-range planning studies. [For example, such groups as: a lay advisory committee, curriculum council, administrative council, planning board, research and development committee, etc.]

Title of Group		Indicate General Areas in Which They Do Planning
	;	
	;	
	;	
	;	
	;	

2. Please indicate which person (or persons) on the administrative staff work most closely with the superintendent on programs of long-range planning for school system. (Give title, or titles, of such persons.)

Title of Person		Indicate General Areas in Which They Do Planning
	;	
	;	
	;	
	;	
	;	

3. Does the school system formally participate with civic agencies; planning commissions; county, state, or federal departments; or other groups in total community long-range planning?

☐ Yes ☐ No

If YES, who represents the school system and what agencies, other than the school system, are involved?

4. What are the principal problems which your school system has encountered (or which you feel might be encountered) in the development of long-range plans to implement long-range objectives? What kind of help do you feel is needed in order to deal with these problems?

[If more space is needed please use following page.]

PROBLEM

The rapidity of change, which is so evident today in all phases of national life, has brought into increasingly sharper focus the need for careful and continual long-range planning by responsible decision-makers in every corporate, governmental, or education organization. However, it is currently apparent that business, industry, and government have moved far ahead of education in the development and utilization of extensive long-range planning programs. The leaders in these fields point out that systematic long-range planning shows the promise of vast benefit not only to the various individual enterprises, but to society as a whole. With the growing necessity for adapting to rapid change and with the increasing availability of evaluative and research tools, more and better long-range planning procedures in school systems are clearly called for. Education should benefit from the fact that other fields have moved ahead with programs for long-term planning. The thinking and the work which has already been done by government and coporate management, in regard to the theory and practice of effective planning, provide a valuable source of experience and background for the development of educational and administrative planning programs in school systems.

The problem identified in this study is that of reviewing some of the current planning practices in school systems which are considered to be already involved in long-range planning; and to describe further long-range techniques which could be adapted for school systems from current corporate and governmental planning procedures.

REVIEW OF LITERATURE

Most of the titles in educational literature which touch on long-range planning or school planning deal primarily with financial, building, or pupil population planning. There is little material available which describes total long-range educational planning for school systems. Some self-studies of school districts or universities outline the case history of a community or school faculty as they work through the establishment of goals and objectives for their program. These studies do not outline the steps beyond goal setting -- plans for implementation. Nor do they discuss the structure for arriving at such plans.

Beyond the field of education per se, one finds considerable reference material on planning programs for corporate management. Both detailed studies of specific firms and general descriptions of the planning process are found in business literature.

Long-range planning is not merely guessing. While no writers suggest that planning can be a "sure thing," there is agreement that a guess based upon a rational appraisal of the range of possibilities (Drucker, 1954, p. 89) is much different than a guess that is simply a gamble. Long-range planning, as an organized field of study, probably dates back to no more than the 1950's (Warren, 1961, p. 20) and even among the companies leading in L R P the majority have been doing it only since 1955 or 56.

The question of how far ahead long-range planning can be projected has been answered in terms of the process involved in planning and the nature of the enterprise doing the planning. In general, though, the length of the planning period (Newell, 1963, p. XVII) has been increasing.

For some organizations two or three years is long-range, for others twenty-five to fifty years might be considered a reasonable planning period. Eighty-two percent of the 114 companies replying to Newell's survey (1963, p. 95) indicated that they did plan for more than one year ahead. Ernest Breech (President, Ford Motor Company) said in 1956 that Ford worked at least three years ahead on new models (Bursk, 1956, p. 11).

There is need for continual revision (Payne, 1958, p. 7) of plans and their "periodic re-extension into the future." Charles Percy (then President of Bell and Howell) indicated in 1956 that their L R P program was projected 5 years ahead from any given present date (Bursk, 1956, p. 19). The main survey companies in Warren's project (1961, p. 32) referred to their long-range planning programs as "Five Year Plans."

A sharp distinction between short- and long-range plans is generally not made (Steiner, 1959, pp. 92-95), (Newell, 1963, p. 75), (Warren, 1961, p. 18), (Bennis, Benne, Chin, 1961, pp. 34-38), and (Seckler-Hudson, 1955, p. 107). The first year or so of a long-range plan is often looked upon as the short-term period (Newell, 1963, p. 175). Obviously the two must be integrated.

What Is a Long-Range Plan?

> "We are learning that the aim of planning is not to perpetuate the present but to anticipate and force the new. The purpose is innovation." (Drucker, 1959, p. 52)

Long-range planning is --

> "the process of devising a basis for a future action." (Seckler-Hudson, 1955, p. 102)

> "decision making. Planning forces a clearer definition of what the company is trying to be. Planning demands the development of a specific work to accomplish its objectives." (St. Thomas, 1965, p. 29)

> "the conscious determination of courses of action designed to reach given objectives....Long-range planning involves much more than a time dimension; it is a continuous process of broad scope. It is a way of thinking, or pattern of business life." (Steiner, 1959, pp. 92-3)

> "a new management technique that coordinates all the people and functions of a company in the achievement of practical goals, developed on a scientific and objective basis." (Payne, 1958, p. 4)

Various students of management have commented on the steps in a L R P. Newell (1963, p. 14) has described them as 1. setting the objectives, 2. forecasting future events and conditions, 3. developing alternative courses of action, 4. evaluating these alternative courses, and 5. deciding upon the most effective course of action.

There is widespread agreement that the initial process in the planning operation is setting objectives or goals (Newell, 1963, pp. 6-7), (Warren, 1961, pp. 10-19), (Oursler, 1962, pp. 12-15). "It is the first responsibility of top management to ask the question 'What is our business?'," writes Peter Drucker (1954, p. 50). There is no long-range planning in any area where goals have not been set or in which management has not taken the initiative. An example cited (Drucker, 1954, p. 83) is in the area of labor relations. If the initiative in this area is left to the union, this is in effect no plan -- no management. This very question is being raised today in terms of the relationship between school administration and teachers' unions (Hechinger, 1965).

Although establishing objectives constitutes the basis for planning, considerable distinction is drawn between long-range plans and these initial objectives (Steiner, 1959, p. 97), (Warren, 1961, pp. 10-19). This was emphasized by Newell

(1961) even in the structure of the questionnaire he used for a survey of approximately 200 companies in Texas. The objectives are only the first step. Objectives or goals are the foundation upon which the plan is built. Total planning must go beyond the goals to describe the means for achieving the objectives. These plans are specific; responsibility is designated; and the plan is staged in identifiable segments with dead lines for each stage (Ginzberg, 1959, p. 78).

Plans are not merely a statement of good intentions (Thompson, 1962, p. 22). Neither is forecasting synonymous with planning (Drucker, 1959, p. 52), (Curran, 1965): as a forecast is based only on past trends. A planning program will include forecasting but goes beyond to include programs for controlling and influencing the future (Oursler, 1962, p. 11). Long-range planning, being based on an estimate of the future, above all calls for the exercise of judgment (Bursk, 1956, p. 51).

Planning cannot be equated with budgeting (Curran, 1965) though financial budgets must be a part of the plan. If the budget is not based on a carefully prepared long-term plan, it is only a short-term forecast.

Local planning is appropriate and necessary. Centralized planning, whether for education or industry, is "too great a risk" (Drucker, 1959, p. 58); "Centralized planning sees the world as a machine. Planning we need; but the risk in innovation alone forbids centralized planning and demands autonomous, competing, local innovation." The central agency (or governmental body stimulates and coordinates the planning (Drucker, 1959, p. 56) but it is not the planner. It cannot afford even to urge conformity of local planning.

Advantages of planning have been studied and observed throughout business and industry. Newell summarizes (1963, p.163) these advantages as 1. providing for orderly growth of an enterprise, 2. coordinating the parts of the firm, 3. improving management performance, 4. providing criteria for making decisions, 5. anticipating problem areas, and 6. anticipating resource needs. Further by-products of planning have been suggested by St. Thomas (1965, p. 32) and include 1. making decisions more realistically, 2. providing the basis for more economical courses of action, and 3. effecting better communications. Also, crisis management becomes less pronounced, new ideas are more quickly adopted, and quality employees are more easily attracted. (Payne, 1958, p. 79).

Role of Top Management:

"...long-range planning will never get anywhere unless the top man (or the top men) are 100 percent sold" (Thompson, 1962, p. 61). This is also emphasized by Newell (1963, p. 21) and repeatedly referred to throughout the literature. The top executive must be continually experimental, imaginative, sensitive to change (Bursk, 1956, p. 11). While top management may not always be the first to see the need for a planned change (Ginzberg, 1957, p. 64), until he does, not much is likely to happen.

However, the top man, or men, cannot develop the long-range plans alone (Ginzberg, 1957, p. 67). Participation of lower-level management in long-range planning is needed (Newell, 1963, p. 22). "If the objectives are spelled out the junior executives can be delegated the jobs of forecasting, developing alternative courses of action, evaluating them, and recommending plans for their respective organizational units" (Newell, 1963, p. 22). The role of top management (Warren, 1961, pp. 71-72) is to carefully evaluate the L R P before approving it and then providing for thorough follow-up. If changes have to be made, the top executive should question closely the reason for such revisions as one aspect of the evaluation of the original plans.

Top management may unwittingly destroy the planning process. If the head of the enterprise is prone to imply or "hint" what he feels the L R P should be, chances are great that he will get this "fed" back to him regardless of facts (Warren, 1962, p. 6). Also, when the top executive places heavy emphasis on detailed long-range budgeting and a financial format (Warren, 1961, p. 62) there is every likelihood that the planning basis for these financially oriented reports will be shallow.

Guidelines for L R P:

The fact that long-range planning is a developmental process has been pointed out by Thompson (1962, p. 56) in his description of how to approach the planning process: "Do not expect perfect results from the first set of plans; make a definite start; involve a few persons initially, more later; base plans on practical understanding of the operation; recognize that the first few attempts will require much time; and provide for control factors."

Two essentials for effective corporate planning (or educational long-range planning) are identified by Thomas J. Watson as communications and education (Weiner, 1963, p. 66). Continued training and retraining (Ginzberg, 1957, p. 136) of staff is an integral part of L R P. As one aspect of this training, many corporations (notably General Motors) move their management people around (Weiner, 1963, p. 68) in order to give them a wide variety of experience (Ginzberg, 1957, p. 75). Equally important, in fact a part of the ongoing education of staff, is free-flowing communications. All members of the organization should understand (Ginzberg, 1957, p. 78) (Seckler-Hudson, 1955, p. 114) as soon as possible what immediate changes will occur as well as the broad long-term changes which have been planned.

It is important for the various levels of management to get away from the day-to-day operation of the enterprise. Periodic planning sessions at a remote location are scheduled by many businesses (Bursk, 1956, p. 20) (Brown, 1963, p. 68) (Seckler-Hudson, 1955, p. 110). Texas Instruments has an annual planning conference (Newell, 1963, p. 89) that runs for 6 days in June.

Who Does the Planning?

> "Planning the work becomes the collective responsibility of all the leaders in the organization." (Seckler-Hudson, 1955, p. 45)

Apparently such questions as the size of the enterprise or whether planning is being done on a departmental or company basis have a bearing on who can or should do the planning. In describing the operation of one company, an executive pointed out (Thompson, 1965, p. 61) that planning "was an additional work load that was put on the men." As a result of this program the particular company found more wholehearted support and enthusiasm demonstrated by management personnel than they ever had encountered before. A similar experience was found in the duPont Public Relations Department (Perry, 1964) where a three-month long-term planning session was conducted by various members of management along with their regular duties and work assignments.

There is, however, a growing tendency to provide for a specific planning position as part of the management team. The corporate planner (MacCullough, 1964, p. 32) (Warren, 1961, p. 58) is a coordinator of planning. He does not do the planning so much as he plans and coordinates the process which assures that others are planning. Summer (1961, p. 17) refers to "...a new versatile breed of managers known as planners, their business is change and their eyes must always be focused on the big picture." Such a position requires the complete backing of top management. Where there is a Planning Board or Planning Committee, the person occupying the position of "Planner" tends to be the chairman of such a board (Schaffer, 1965, p. 21). Several writers (Summer, 1961, pp. 21-30) (Warren, 1961, p. 58) emphasize that the head of planning should not be too young or too new to the enterprise, neither too old or "tired." Rather he must have broad experience, be widely respected, and willing to see and urge change where needed. There is strong evidence (Warren, 1962, p. 13) to suggest that a controller or financial business manager is not a good person for the planning position.

Usually where the position "Planner" is found, there is also provided a staff of planning specialists (Schaffer, 1965, pp. 24-25) which are organized on a task force basis -- with total projects assigned to individual members. A minimum staff includes a head and one or two assistants, plus secretaries (Schaffer, 1965, p. 23).

Effective planning programs involve people throughout the enterprise. Argyris (1953, p. 134) points out that there is a need to provide staff all up and down the line with opportunities to participate in planning and to assume responsibilities. Negative effects are the result of a "domineering" organizational leader (Argyris, 1953, p. 135).

A Planning Board or Planning Committee is considered essential (Bursk, 1956, p. 20-21) (Payne, 1958, p. 74) (Newell, 1963, p. 22). Indeed central management sets the tone for the whole L R P program by who they appoint to the Planning Board (Warren, 1961, p. 68-9). Membership on such a board should involve various levels of management and should cut across organizational lines in order to avoid planning that is too narrowly oriented. Some boards provide for rotating (Payne, 1958, p. 74) membership, thus increasing the degree of involvement.

L R P in School Systems:

The foregoing data from fields outside education suggest that planning procedures developed in these fields can be relevent to long-range planning for school systems. Cooperation in the sharing of insights will benefit all. During a workshop discussion on "Management in the Future," sponsored by Columbia's School of Business (Brown, 1963, p. 68), David Rockefeller, one of the participants, stated: "It seems to me that each of the major segments of our economy goes off by itself, talks to itself, and thinks about itself. If we are going to have a successful, forward-moving society, we have got to find some way of mixing these groups much more...in the managerial level....There have got to be periodic opportunities to get away from the day-to-day grind, to take a look at the total picture." This fragmentation and compartmentalization is noticeable within various enterprises as well as between them (Ryans, 1963, p. 361). In education, for example, school systems - rather than operating as a system - tend to become a loose organization of very highly departmentalized structures.

Industrial planners, looking at education, have suggested (Brown, 1963, p. 70) that the role of the teacher properly belongs in the management category. Just as with other members of management, the role of the teacher will be greatly changed by modern technology and automation. John Burns (former President of R. C. A.) stated that "What actually should happen in educational television is that we should be able to get a teacher to sit with the students" (Brown, 1963, p. 70) and similar situations will occur in business where management will assume highly increasing skills and the drudgery will be eliminated. Such observations as these by Rockefeller and Burns emphasize the need for more sharing, in the matter of long-range planning, between education, corporate management, and the other organizational elements of our society.

The urgent need for extensive long-range planning in school systems is evident in the broad kinds of program decisions which school boards and school administrators must make. Goldhammer (1964, pp. 100-101) has described some of these areas: "It is the function of the school board, acting on the advice of the professional staff and after careful study of the imperatives of the social scene, to determine the ends that should be served by public education, the extent to which various programs will be provided, the extension of educational programs downward below the first grade and upward beyond the twelfth grade, the degree to which curriculum should encompass both college and non-college preparatory courses, and the degree to which specialized and general education are to be incorporated within the school. These are issues which should be discussed by the school board and clearly delineated....A clear statement of goals and principles is not an academic exercise; it is a statement of the criteria upon which the schools will be evaluated." This suggests that one aspect of L R P in school systems should be regular evaluative reports (Goldhammer, 1964, p. 103) presented to the top administration and board by the professional staff.

In spite of this need to spend time on fundamental planning and evaluation, most boards today (Goldhammer, 1964, p. 76) devote most of their time to routine housekeeping chores and reporting duties (often required by state statutes). A fundamental problem,(Goldhammer, 1954, p. 199) in regard to effective school system planning, seems to be the difficulty boards have in getting the information that they desire as the basis for decision-making. The top school administrator seldom gives the board all the information required for planning purposes (Goldhammer, 1954, p. 200). Further complicating the planning function is a noticeable failure by boards and administrators to define and agree upon roles (Goldhammer, 1954, p. 214).

Educational leaders are increasingly expressing concern about the need for L R P. In regard to curriculum and instructional planning (A.A.S.A., 1963, p. 12) this planning must provide for systematic review and evaluation. The basis for evaluation has long been a major problem. There is growing optimism about the evaluative tools available to the educational planner and innovator (Miles, 1964, pp. 756-59).

While new ideas and innovations are apparently being implemented more rapidly in education today than in the past (Miles, 1964, p. 7), the rate of change is still slow and the deliberate planning of change is more often than not rejected (Miles, 1964 p. 647) and (Ryans, 1963, p. 361). Clearly one of the problems in the implementing of change has been that where innovations have been "directed" inadequate training (Ginzberg, 1957, p.136) of those who are to carry out the change has defeated the purpose of the plan.

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Description of Methods

I. Survey questionnaires were sent to

1. approximately 300 school systems,

2. which were selected by

   the recommendations of a panel including chief state school officers and about 75 local superintendents. In the latter group are superintendents who have, over the past twenty-five years, been among the invited participants to the Annual Superintendents Work Conference at Teachers College, Columbia University, and also other selected local superintendents who have demonstrated planning leadership.

II. Interviews were conducted with

1. management in selected corporations and government agencies or departments (list on p.80)

2. administrative leaders in selected school systems.

III. Data:

1. Research and literature on long-range planning in corporate management, government, and education were searched for significant findings which relate to effective planning procedures for school systems.

2. Individual interviews were conducted with selected management or administrative personnel in corporations, government, and school systems, to further identify the specific elements of a planning program appropriate for school systems. Most interviews were taped.

3. Responses to survey questions, both forced-choice and open ended, were summarized. Questionnaire responses were tabulated, categorized, and analyzed. To expedite this process, information

was placed on punch cards in order to utilize data processing equipment in the analysis. Information from interviews was analyzed, compared with data from other sources, and formulated into a synthesis as a basis for describing a process for long-range planning. All questionnaire and interview data was studied in relation to findings from current research and literature in the area of long-range planning.

Long-Range Trends

Effective long-range planning for American education requires that those who are doing the planning look long and hard at major societal conditions and trends as they have implications for our public schools. Such a basic study has a twofold impact. It dramatically re-emphasizes the critical need for systematic planning since even a casual observation of current tensions and trends is enough to convince one that to confront the challenge of tomorrow without forward planning would be folly. In addition, the second reason for a careful look at the future is the obvious need to employ this data in the long-range planning process.

General Societal Considerations for the Next Decade

1. The status of the individual must remain our primary concern. A critical human loss, that urban and suburban living entails, is the status-dominated life style which forces individuals into a rigid mold from within which they can see only limited aspects of human reality.

2. The great conflict facing the world today is between those who feel that societal planning and change must be imposed by force and those who believe that a free social order can plan and change through education and persuasion. Schools must develop more creative and effective ways for building a better understanding of the democratic process.

3. Educational and political leadership will increasingly struggle with the growing gap between our technological advances in the 20th century world and our understanding and outlook as human partners in an international community.

4. An increasingly larger percentage of our nation's youth will be educated in the major urban centers, where currently financial assistance for education and the quality of education are at a low ebb. Approximately 18 to 20% of our youth are already in these schools. A new framework for the urban society is merging.

5. There exists today a lack of effective, constructive, and easy communication between the leaders and thinkers (as well as the line and staff workers) of various fields of social concern e.g. government, welfare, health, industry, education.

6. The level of national assistance for public schools in our country will rapidly increase over the next decade -- with this financial assistance will come stress and inevitable changes in the public school's relationship to private and parochial schools, to non-school educational agencies, to state governments, to the federal government and to intermediary governmental bodies.

7. The rapid increase of automation in the United States suggests far reaching changes in employment patterns, retrain-

ing programs, and in terms of a new consideration of work as a value in our society.

Assumptions About Educational Trends

1. Long-range planning will become a first priority for school systems. Personnel additions and reorganization of staff responsibilities will be needed to accomplish such planning.

2. There will be increased emphasis on meeting the physical, mental, and emotional needs of children; this will include a different kind of climate in the classroom with teachers more fully understanding how their actions affect children.

3. More learning experiences will be provided which develop broad international understandings as well as cultural appreciations.

4. More effective procedures for teacher evaluation and guidance will be developed; including individualized professional growth programs for all professional staff members.

5. Educational leadership and administration will have increased and rapidly changing responsibilities during the next several decades. Intensive and extensive retraining programs will be essential.

6. In education, as well as corporate management, a major emphasis will be directed toward research on teaching and learning. A specific emphasis in the school program will be devoted to helping individuals discover "how to learn."

7. There will be increased opportunities for children to participate in first-hand learning experiences in the community as a way of gaining insight into societal problems -- the beginning of learning to be a citizen.

8. Standards in teacher training programs will be raised to new levels of high quality with accompanying increases in salary levels for teachers and the need for sophisticated recruitment procedures.

9. There will be increased attention to evaluation of, and development of individual creativity in children.

10. The involvement of citizens from the community as individuals and as groups, to work with school staffs in planning for the improvement of education, will be a continuing trend in school districts.

11. Evaluation and appraisal of the educational program will receive high priority.... this will involve new measurements of quality at the local level as well as increased use of national evaluation and assessment studies.

12. Four year old education for all children and new educational programs for four, five, and six year olds will rapidly move ahead in the next decade.

13. Secondary schools will provide more work experience programs for non-college bound students; there will probably be an accompanying trend away from the traditional vocational

school at the high school level.

14. Flexible arrangements for classroom and school day organization will increase; (team teaching, large and small group instruction, nongraded primary programs, and individualized instruction).

15. More and more attention will be given to dissemination of school information to the community and two-way communication between school and home.

16. There will be increased use of communication skills and teaching tools such as: TV, programmed instruction, instructional materials center, tele-learning, audio visual equipment, overhead projectors, cartridge 8 mm projectors, primary typewriter, and data processed information retrieval.

17. More clerical/technical help will be provided for teachers; both paid and volunteer.

18. There will be expanded utilization of public school facilities and personnel for adult education programs; also extended school year and school day programs for adults and children.

19. A trend toward a middle school organization to serve former upper elementary and lower junior high levels is already noticeable.

20. Research programs will be undertaken at all levels -- Federal, State, and local. This trend will include:

(1) More systematic utilization of research studies and findings which are available from numerous "outside" sources, e. g. college and university research, Federal Government, foundations, national research organizations and societies.

(2) Establishment of cooperative relationship with universities for research, development of educational programs, and training of teachers-in-preparation as well as on-the-job staff members.

(3) Action research projects in the schools at the local district level.

21. Community college programs will be available close to most communities. Students will live at home for the thirteenth and fourteenth year of schooling.

22. Local medical committees will be utilized as advisory groups to assist in the development of a new approach to the health program in public schools.

23. Guidance programs for college bound students will be considerably revised in the direction of giving high school graduates (and their parents) more information and insight in regard to the offerings of many (and different types of) colleges and the critical changes which are taking place in American higher education.

24. There will be a continuing trend toward larger school districts and regional cooperation among districts.

25. Public school leadership will discover a new role of involvement in the total civic - governmental - political life of the community and region. Schools, in cooperation with a wide range of community, state, and federal agencies, will participate in

a total educational effort far more inclusive than the traditional 12 year - 10 month public school program.

QUESTIONNAIRE FINDINGS

Summary

The communities used in the questionnaire study generally ranged from 10,000 to 100,000+ in size. There were no significant differences in the kinds of responses made to questions about areas of long-range planning between the smaller communities of 10,000 or 25,000 residents and the larger communities of 75,000 or 100,000 and over.

Over 71% of the districts reported per pupil expenditures ranging from $250 to $600. Only 6% of the districts indicated per pupil expenditures over $900. While this represents a cross section of economic levels it was notable that planning practices did vary greatly.

One impact on the administrative structure showed up in the indication by 38% of the districts that a staff position had been created called Coordinator of Federal Programs, or a similar title. It was not clear that this position was specifically tied in with long-range planning, however the questionnaire may not have been discriminating enough to pick this up. The fact that applications for the many new Federal Programs require extensive long-range outlines and plans suggests that with the appointment of personnel in this area there will be increased attention given to preparation of at least some detailed long-range plans.

School districts reported the existence of detailed long-range plans more frequently than they reported the existence of written long-range objectives (see pp. 41-44). The only areas to show up with written long-range objectives in 30% or more of the questionnaires were "Per Pupil Enrollment Projections," "School Plant Planning," and "Development of General School District Policies."

Long-range plans were reported for the following areas in 50% or more of the districts responding: "In-Service and Professional Growth for Administrative and Supervisory Staff," "Budgeting and Financial Planning," "Pupil Enrollment Projections," "School Plant Planning," "Standardized Testing Program," "Replacement of Textbooks," and "Vocational Education."

Where long-range plans were shown as having been prepared, the most frequently mentioned time period was five (5) years. Actually, in most cases a majority of districts omitted any response to number of years for long-range plans.

The only curriculum areas for which long-range plans were prepared by 15% or more of the districts were: foreign languages, English, science, social studies, and mathematics. Twelve (12) per cent of the districts reported long-range plans for industrial arts.

DESCRIPTION OF SCHOOL DISTRICTS

Forty-five percent of the responses were for communities from 25,000 to 75,000 in size. Sixteen percent of the responses were for communities 10,000 to 15,000 in size. Twenty-seven percent of the responses were for communities 100,000 or larger in size.

Sixty percent of districts responding included grades K through 12. Twenty-three percent included grades 1 through 12. Seven percent included grades K through 14.

Per pupil expenditures ranged from $250 to $1300. (approximately 15 did not report per pupil expenditure). Of those reporting, seventy-one percent ranged from $250 to $600. Six percent were $900 or over.

Forty-one percent had Deputy or General Assistant Superintendents. Seventy-six percent had Assistant Superintendents for Curriculum. Eighty-three percent had Assistant Superintendents for Business. Forty percent had Assistant Superintendents for Personnel. (additional thirty-eight percent had Directors of Personnel). Forty percent had 1 to 6 subject supervisors. Twenty-nine percent had no subject supervisors. Fourteen percent had 15 or more subject supervisors. Under other central administrative personnel thirty-eight percent indicated Coordinator of Federal Programs.

The median total number of central administrative staff was 11.

TABLE I

SUMMARY DATA FROM CROSS TABULATIONS OF GRADE LEVELS INCLUDED IN A SCHOOL DISTRICT AND EXISTENCE OF LONG-RANGE OBJECTIVES AND/OR LONG-RANGE PLANS

(Ques. 3 Page 1 cross tabulated with Questions 1-20)
pp. 3 & 4

Respondents: 210

For the twenty listed areas or categories of Long-Range Objectives and/or Plans the following responses were found among school districts that included grades K - 12 and all school districts:

	(125 Districts with Grades K - 12)		All Districts (210 Respondents)	
Areas Having Objectives and/or Plans	% Having Written Long-Range Objectives	% Having Detailed Long-Range Plans	% Having Written Long-Range Objectives	% Having Detailed Long-Range Plans
1. Development of General School District Policies	37%	26%	65%	49%
2. In-Service and Professional Growth for Administrative and Supervisory Staff	18	29	32	50
3. Cooperative Planning With Neighboring School Districts	10	17	19	31
4. Cooperative Planning With Lay Citizens	16	18	29	33

Areas Having Objectives and/or Plans	% Having Written Long-Range Objectives	% Having Detailed Long-Range Plans	% Having Written Long-Range Objectives	% Having Detailed Long-Range Plans
5. School Organization (regarding the grouping of grades)	17%	26%	33%	45%
6. Salary Planning	26	26	43	46
7. Study of Long-Range Professional Personnel Needs	16	25	27	43
8. Budgeting and Financial Planning	21	29	37	51
9. Pupil Enrollment Projections	32	45	56	75
10. Per Pupil Cost Projections	9	12	16	25
11. School Plant Planning	28	42	50	71
12. Replacement and Procurement of Materials and Equipment	16	23	26	39
13. Teacher In-Service and Professional Growth	22	30	34	48
14. Psychological Services and Guidance Program	20	27	33	43
15. Standardized Testing Program	24	28	43	50
16. Replacement of Textbooks	19	30	35	53
17. Meeting the Needs of Different Kinds of Students Within the School	23	29	38	47

Areas Having Objectives and/or Plans	% Having Written Long-Range Objectives	% Having Detailed Long-Range Plans	% Having Written Long-Range Objectives	% Having Detailed Long-Range Plans
18. Adult Education	15%	23%	27%	35%
19. Vocational Education	20	30	33	50
20. Innovating Methods of Teaching (e.g. learning labs, dial systems, etc.)	13	20	24	36

The three most frequent types of school districts responding were 1 - 12: 23% of all 210 respondents, K - 12: 60% of respondents, and K - 14: 7% of respondents. There were no significant differences in the characteristics of the responses for these subgroupings versus the characteristics found in the total responses.

The school districts responding to this portion of the questionnaire more frequently indicated that they had prepared detailed long-range plans than that they had written long-range objectives. The only area which consistently did not show this contradiction was the area "Development of General School District Policies." Here 65% of all districts responding said they had written long-range objectives and 49% indicated they had detailed long-range plans.

Fifty percent or more of all respondents indicated that long-range plans existed in the following areas: 2. In-Service and Professional Growth for Administrative and Supervisory Staff, 8. Budgeting and Financial Planning, 9. Pupil Enrollment Projections, 11. School Plant Planning, 15. Standardized Testing Program, 16. Replacement of Textbooks, 19. Vocational Education.

The areas of "Per Pupil Enrollment Projections" (75%) and "School Plant Planning" (71%) were most frequently shown as having detailed long-range plans. Also, these two areas plus the "Development of General School District Policies" were the only three areas to show up with written long-range objectives in 30% or more of the questionnaires.

The number of years for which long-range plans were prepared shows in column D of Part A, Section II. The intervals referred to were most frequently 2, 3, 5, or 10 year periods.

TABLE II Long-Range Plans for how many years

(Data refers to % of respondents)

Areas With Long-Range Plans	2 Years	3 Years	5 Years	10 Years	Over 10 Years	Omit
1. Development of General School District Policies	5%	3%	17%	6%	3%	61%
2. In-Service and Professional Growth for Administrative and Supervisory Staff	8	7	11	2	3	61
3. Cooperative Planning With Neighboring School Districts	5	5	7	1	2	75
4. Cooperative Planning With Lay Citizens	5	4	7	5	2	74
5. School Organization (regarding the grouping of grades)	3	2	12	5	5	69
6. Salary Planning	12	9	10	-	3	60
7. Study of Long-Range Professional Personnel Needs	3	8	15	7	3	62
8. Budgeting and Financial Planning	7	11	22	4	2	49
9. Pupil Enrollment Projections	-	4	30	25	6	25
10. Per Pupil Cost Projections	4	4	9	3	2	75
11. School Plant Planning	2	4	30	15	8	31
12. Replacement and Procurement of Materials and Equipment	5	5	14	2	2	68
13. Teacher In-Service and Professional Growth	10	8	7	3	2	66

Areas With Long-Range Plans	2 Years	3 Years	5 Years	10 Years	Over 10 Years	Omit
14. Psychological Services and Guidance Program	6%	10%	11%	1%	2%	66%
15. Standarized Testing Program	5	9	8	2	3	68
16. Replacement of Textbooks	2	2	22	2	3	60
17. Meeting the Needs of Different Kinds of Students Within the School	6	6	11	2	4	68
18. Adult Education	4	6	6	1	2	78
19. Vocational Education	5	7	12	5	2	62
20. Innovating Methods of Teaching (e.g. learning labs, dial systems, etc.)	2	6	10	3	2	73

The areas of Budgeting, Enrollment, and Plant Planning were the only three areas which were responded to under column "D" in more than 50% of the questionnaires. Budgeting showed long-range plans for 5 years in 22% of the cases; Enrollment showed plans for 5 years in 30% of the cases and for 10 years in 25% of the questionnaires; and Plant Planning showed long-range plans for 5 years in 30% of the districts and for 10 years in 15%.

TABLE III

ANALYSIS OF LONG-RANGE PLANS IN CURRICULUM AND OTHER AREAS (OPEN-ENDED QUESTIONS - SECTION II, PART A, p. 4)

Most frequent curriculum responses were coded and numbered 21 through 32. Summary of this data shows:

No.		% Having Written Long-Range Objectives	% Having Detailed Long-Range Plans	Plans for How Many Years (Most Frequent Responses)
21.	Foreign Languages	13%	15%	3 - 5 yrs.
22.	English	22	22	5 yrs.
23.	Science	64	31	3 - 5 yrs.
24.	Social Studies	23	21	5 yrs.
25.	Work-Study Programs	1	2	3 yrs.
26.	Mathematics	30	31	5 yrs.
27.	Physical Education & Health	7	7	5 yrs.
28.	Industrial Arts	10	12	5 yrs.
29.	Business Education	4	6	5 yrs.
30.	Home Economics	5	6	5 yrs.
31.	Music	4	5	5 yrs.
32.	Art	5	6	5 yrs.

Other areas in which long range objectives and/or plans were indicated included: desegregation, use of media, data processing, library, and planning for Federal projects. None of these categories were referred to in more than 10 percent of the questionnaires.

TABLE IV

SUMMARY DATA FROM CROSS TABULATION OF PER PUPIL EXPENDITURES AND EXISTENCE OF LONG-RANGE OBJECTIVES AND/OR LONG-RANGE PLANS

(Question 4, page 2 cross tabulated with Questions 1 - 20 pp. 3 & 4)

(Included below are only those areas for which 35% or more of the respondents indicated they had prepared written long-range objectives and/or plans)		Level of Per Pupil Expenditure					
		Below $350	$350 to 449	$450 to 549	$550 to 649	$650 to 749	$750 and Above
1. Development of General School District Policies	(B)*	57%	68%	63%	46%	81%	69%
	(C)	52	44	48	33	44	65
2. In-Service and Professional Growth for Administrative and Supervisory Staff	(B)	38	34	31	38	13	38
	(C)	76	59	40	42	31	52
5. School Organization (regarding the grouping of grades)	(B)	43	27	39	13	13	34
	(C)	43	39	50	33	50	48

*(B) Written Long-Range Objectives

(C) Detailed Long-Range Plans

Note: The percentages in this chart are not calculated as percentages of the total number of respondents but rather represent the percent of districts in the indicated per pupil expenditure category which have long-range objectives (B) or long-range plans (C).

		Below $350	$350 to 449	$450 to 549	$550 to 649	$650 to 749	$750 and Above	
6. Salary Planning	(B)	38%	39%	48%	42%	56%	45%	
	(C)	48	49	44	29	50	48	
7. Study of Long-Range Professional Personnel Needs	(B)	19	20	32	17	38	41	
	(C)	52	32	44	25	38	62	
8. Budgeting and Financial Planning	(B)	29	37	39	38	50	28	
	(C)	14	54	53	50	56	55	
9. Pupil Enrollment Projections	(B)	38	56	65	46	56	55	
	(C)	48	78	74	83	69	86	
11. School Plant Planning	(B)	43	54	55	38	63	45	
	(C)	62	73	71	71	75	69	
13. Teacher In-Service and Professional Growth	(B)	24	39	35	38	44	31	
	(C)	48	49	44	38	44	62	
15. Standardized Testing Program	(B)	38	46	50	21	50	45	
	(C)	52	61	52	38	38	49	
16. Replacement of Textbooks	(B)	38	37	39	25	44	28	
	(C)	52	61	55	50	44	38	
17. Meeting the Needs of Different Kinds of Students Within the School	(B)	29	37	42	21	50	45	
	(C)	47	44	39	33	56	55	
Numbers of districts in each per-pupil expenditure category:		21	41	62	24	16	29	17 Omitted

TABLE V

PERSONNEL AND GROUPS INVOLVED IN THE PLANNING FUNCTION

(Section II, Part B, p. 5)

The groups most frequently mentioned as developing or coordinating long-range planning studies were:

Curriculum or Instruction Council	40%
Administrative Council or Superintendent's Council, etc.	60%
Lay Advisory Committees	50%

The key persons assisting the Superintendent with Long-Range Planning were:

Director of (or Assistant Superintendent for) Instruction	55%
Director of (or Assistant Superintendent for) Business	48%
Assistant Superintendent (s)	36%
Building Principals	18%
Personnel with title of Director, or Coordinator, or Assistant Superintendent for Planning	1.5%

TABLE VI

PRINCIPAL PROBLEMS WHICH SCHOOL SYSTEMS ENCOUNTER IN ATTEMPTING LONG-RANGE PLANNING

(Open-ended question, p. 7)

Only two responses were found as frequently as 30% of the time for all questionnaires. These two principal problems cited were:

.... Lack of funds or lack of knowledge about future financial support.

- Mentioned by 40% of the respondents

.... Lack of personnel to do or to assist with systematic long-range planning.

- Mentioned by 30% of the respondents

Four other categories of problems were mentioned sufficiently often to be noted here:

Lack of time	20%
Lack of coordination with municipality, local agencies, etc.	17%
Lack of adequate communication with community (school hasn't "sold" itself to public)	17%
Deterrent to planning created by highly mobile population, or rapid population increase	16%

TABLE VII

CROSS TABULATION OF GRADE LEVELS INCLUDED IN A SCHOOL DISTRICT AND EXISTENCE OF LONG-RANGE OBJECTIVES AND/OR LONG-RANGE PLANS*

Grade Level Key:

1(1-12) 2(1-14) 3(7-12) 4(8-12) 5(9-12) 6(K-8) 7(K-12) 8(K-14) 9(omit)

Question Numbers and Letters

Refers to Categories of Objectives and/or Plans

Item B
0 = Omit
1 = Long-Range Objectives
2 = No Long-Range Objectives
3 = Written Long-Range Objectives

Item C
0 = Omit
1 = Detailed Long-Range Plans
2 = No Detailed Long-Range Plans

* Location in questionnaire: Page 2, Question 3(section 1) cross tabulated with Questions 1-20, pages 3 and 4 (section II part A)

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                                  GRA. LEVEL

QUES.   01      TOTAL     1      2      3      4     5      6     7     8      9

ITEM B
  0              21       5      1      1      0     0      1    13     0      0
%                10       2      0      0      0     0      0     6     0      0

  1              44       9      0      0      0     1      0    30     3      1
%                21       4      0      0      0     0      0    14     1      0

  2               9       2      0      0      0     0      1     5     1      0
%                 4       1      0      0      0     0      0     2     0      0

  3             136      33      1      0      1     4      5    77    11      4
%                65      16      0      0      0     2      2    37     5      2

TOTAL NUMBERS   210      49      2      1      1     5      7   125    15      5
TOTAL %                   23      1      0      0     2      3    60     7      2

CHI SQUARE =     21.26
 24 DEGREES OF FREEDOM

ITEM C
  0              68      14      0      1      0     2      3    43     5      0
%                32       7      0      0      0     1      1    20     2      0

  1             103      28      2      0      1     3      4    55     6      4
%                49      13      1      0      0     1      2    26     3      2

  2              39       7      0      0      0     0      0    27     4      1
%                19       3      0      0      0     0      0    13     2      0

TOTAL NUMBERS   210      49      2      1      1     5      7   125    15      5
% TOTAL                   23      1      0      0     2      3    60     7      2

CHI SQUARE =     14.14
 16 DEGREES OF FREEDOM
```

GRA. LEVEL

QUES. 02	TOTAL	1	2	3	4	5	6	7	8	9
ITEM B										
0	24	4	0	1	0	0	0	19	0	0
%	11	2	0	0	0	0	0	9	0	0
1	93	26	0	0	0	1	4	53	6	3
%	44	12	0	0	0	0	2	25	3	1
2	26	3	0	0	0	2	2	16	3	0
%	12	1	0	0	0	1	1	8	1	0
3	67	16	2	0	1	2	1	37	6	2
%	32	8	1	0	0	1	0	18	3	1
TOTAL NUMBERS	210	49	2	1	1	5	7	125	15	5
% TOTAL		23	1	0	0	2	3	60	7	2

CHI SQUARE = 30.90
24 DEGREES OF FREEDOM

QUES. 02	TOTAL	1	2	3	4	5	6	7	8	9
ITEM C										
0	67	16	1	0	0	0	2	40	7	1
%	32	8	0	0	0	0	1	19	3	0
1	105	26	1	1	1	4	3	61	4	4
%	50	12	0	0	0	2	1	29	2	2
2	38	7	0	0	0	1	2	24	4	0
%	18	3	0	0	0	0	1	11	2	0
TOTAL NUMBERS	210	49	2	1	1	5	7	125	15	5
% TOTAL		23	1	0	0	2	3	60	7	2

CHI SQUARE = 11.50
16 DEGREES OF FREEDOM

```
                              GRA. LEVEL

QUES.   03     TOTAL     1      2      3      4      5      6      7      8      9

ITEM B
  0              33      5      1      1      0      1      1     22      2      0
%                16      2      0      0      0      0      0     10      1      0

  1              85     20      1      0      0      2      1     55      4      2
%                40     10      0      0      0      1      0     26      2      1

  2              52     18      0      0      0      0      0     28      6      0
%                25      9      0      0      0      0      0     13      3      0

  3              40      6      0      0      1      2      5     20      3      3
%                19      3      0      0      0      1      2     10      1      1

TOTAL NUMBERS   210     49      2      1      1      5      7    125     15      5
%  TOTAL                23      1      0      0      2      3     60      7      2

CHI SQUARE =     42.62
 24 DEGREES OF FREEDOM

ITEM C
  0              82     19      0      1      0      2      1     51      7      1
%                39      9      0      0      0      1      0     24      3      0

  1              66     12      1      0      1      2      6     35      5      4
%                31      6      0      0      0      1      3     17      2      2

  2              62     18      1      0      0      1      0     39      3      0
%                30      9      0      0      0      0      0     19      1      0

TOTAL NUMBERS   210     49      2      1      1      5      7    125     15      5
TOTAL %                 23      1      0      0      2      3     60      7      2

CHI SQUARE =     23.72
 16 DEGREES OF FREEDOM
```

2

```
                          GRA. LEVEL

QUES.   04    TOTAL    1     2     3    4     5     6     7     8     9

ITEM B
  0            24      4     1     1    0     0     2    15     1     0
%             11     2     0     0    0     0     1     7     0     0

  1            83     23     0     0    1     1     1    50     6     1
%             40    11     0     0    0     0     0    24     3     0

  2            43      9     0     0    0     2     2    26     2     2
%             20     4     0     0    0     1     1    12     1     1

  3            60     13     1     0    0     2     2    34     6     2
%             29     6     0     0    0     1     1    16     3     1

TOTAL NUMBERS 210     49     2     1    1     5     7   125    15     5
TOTAL %               23     1     0    0     2     3    60     7     2

CHI SQUARE =   23.78
 24 DEGREES OF FREEDOM

ITEM C
  0            80     22     0     1    0     0     3    47     5     2
%             38    10     0     0    0     0     1    22     2     1

  1            70     19     1     0    1     2     2    38     5     2
%             33     9     0     0    0     1     1    18     2     1

  2            60      8     1     0    0     3     2    40     5     1
%             29     4     0     0    0     1     1    19     2     0

TOTAL NUMBERS 210     49     2     1    1     5     7   125    15     5
TOTAL %               23     1     0    0     2     3    60     7     2

CHI SQUARE =   13.51
 16 DEGREES OF FREEDOM
```

		GRA. LEVEL								
QUES. 05	TOTAL	1	2	3	4	5	6	7	8	9
ITEM B										
0	31	5	1	1	0	1	1	20	2	0
%	15	2	0	0	0	0	0	10	1	0
1	72	16	0	0	0	1	1	45	7	2
%	34	8	0	0	0	0	0	21	3	1
2	38	6	0	0	1	2	2	24	2	1
%	18	3	0	0	0	1	1	11	1	0
3	69	22	1	0	0	1	3	36	4	2
%	33	10	0	0	0	0	1	17	2	1
TOTAL NUMBERS	210	49	2	1	1	5	7	125	15	5
TOTAL %		23	1	0	0	2	3	60	7	2

CHI SQUARE = 23.32
24 DEGREES OF FREEDOM

		GRA. LEVEL								
ITEM C										
0	70	19	0	1	0	2	3	40	4	1
%	33	9	0	0	0	1	1	19	2	0
1	95	26	1	0	0	1	2	55	6	4
%	45	12	0	0	0	0	1	26	3	2
2	45	4	1	0	1	2	2	30	5	0
%	21	2	0	0	0	1	1	14	2	0
TOTAL NUMBERS	210	49	2	1	1	5	7	125	15	5
TOTAL %		23	1	0	0	2	3	60	7	2

CHI SQUARE = 19.04
16 DEGREES OF FREEDOM

```
                              GRA. LEVEL

QUES.   06    TOTAL     1     2     3     4     5     6     7     8     9

ITEM B
  0             31      6     0     1     0     1     1    20     0     2
%               15      3     0     0     0     0     0    10     0     1

  1             64     23     1     0     1     1     0    35     3     0
%               30     11     0     0     0     0     0    17     1     0

  2             25      4     0     0     0     0     2    15     3     1
%               12      2     0     0     0     0     1     7     1     0

  3             90     16     1     0     0     3     4    55     9     2
%               43      8     0     0     0     1     2    26     4     1

TOTAL NUMBERS  210     49     2     1     1     5     7   125    15     5
TOTAL %                23     1     0     0     2     3    60     7     2

CHI SQUARE =     29.50
 24 DEGREES OF FREEDOM

ITEM C
  0             67     15     1     0     0     0     3    40     5     3
%               32      7     0     0     0     0     1    19     2     1

  1             96     24     1     1     1     4     3    54     6     2
%               46     11     0     0     0     2     1    26     3     1

  2             47     10     0     0     0     1     1    31     4     0
%               22      5     0     0     0     0     0    15     2     0

TOTAL NUMBERS  210     49     2     1     1     5     7   125    15     5
TOTAL %                23     1     0     0     2     3    60     7     2

CHI SQUARE =     9.76
 16 DEGREES OF FREEDOM
```

```
                                  GRA. LEVEL
QUES.  07      TOTAL    1     2     3     4     5     6     7     8     9

ITEM B
  0             27      4     0     1     0     0     1    20     0     1
%               13      2     0     0     0     0     0    10     0     0

  1             84     26     1     0     1     2     2    45     6     1
%               40     12     0     0     0     1     1    21     3     0

  2             43      9     0     0     0     0     3    27     4     0
%               20      4     0     0     0     0     1    13     2     0

  3             56     10     1     0     0     3     1    33     5     3
%               27      5     0     0     0     1     0    16     2     1

TOTAL NUMBERS  210     49     2     1     1     5     7   125    15     5
TOTAL %                23     1     0     0     2     3    60     7     2

CHI SQUARE =     27.06
 24 DEGREES OF FREEDOM

ITEM C
  0             72     18     1     1     0     1     3    42     5     1
%               34      9     0     0     0     0     1    20     2     0

  1             90     23     0     0     0     4     0    53     6     4
%               43     11     0     0     0     2     0    25     3     2

  2             48      8     1     0     1     0     4    30     4     0
%               23      4     0     0     0     0     2    14     2     0

TOTAL NUMBERS  210     49     2     1     1     5     7   125    15     5
TOTAL%                 23     1     0     0     2     3    60     7     2

CHI SQUARE =     21.20
 16 DEGREES OF FREEDOM
```

```
                                 GRA. LEVEL
QUES.   08    TOTAL     1     2     3     4     5     6     7     8     9

ITEM B
   0            33      6     1     1     0     1     1    21     2     0
%             16      3     0     0     0     0     0    10     1     0

   1            75     18     0     0     1     3     0    47     5     1
%             36      9     0     0     0     1     0    22     2     0

   2            25      9     0     0     0     0     2    12     1     1
%             12      4     0     0     0     0     1     6     0     0

   3            77     16     1     0     0     1     4    45     7     3
%             37      8     0     0     0     0     2    21     3     1

TOTAL NUMBERS  210     49     2     1     1     5     7   125    15     5
TOTAL %                23     1     0     0     2     3    60     7     2

CHI SQUARE =     22.60
 24 DEGREES OF FREEDOM

ITEM C
   0            72     12     0     1     0     2     3    48     5     1
%             34      6     0     0     0     1     1    23     2     0

   1           108     25     2     0     1     3     4    61     9     3
%             51     12     1     0     0     1     2    29     4     1

   2            30     12     0     0     0     0     0    16     1     1
%             14      6     0     0     0     0     0     8     0     0

TOTAL NUMBERS  210     49     2     1     1     5     7   125    15     5
TOTAL %                23     1     0     0     2     3    60     7     2

CHI SQUARE =     14.01
 16 DEGREES OF FREEDOM
```

GRA. LEVEL

QUES. 09	TOTAL	1	2	3	4	5	6	7	8	9
ITEM B										
0	29	5	1	1	0	1	1	19	1	0
%	14	2	0	0	0	0	0	9	0	0
1	47	13	0	0	0	0	1	30	3	0
%	22	6	0	0	0	0	0	14	1	0
2	16	4	0	0	1	0	0	8	3	0
%	8	2	0	0	0	0	0	4	1	0
3	118	27	1	0	0	4	5	68	8	5
%	56	13	0	0	0	2	2	32	4	2
TOTAL NUMBERS	210	49	2	1	1	5	7	125	15	5
% TOTAL		23	1	0	0	2	3	60	7	2

CHI SQUARE = 33.08
24 DEGREES OF FREEDOM

	TOTAL	1	2	3	4	5	6	7	8	9
ITEM C										
0	44	11	0	0	0	1	1	26	5	0
%	21	5	0	0	0	0	0	12	2	0
1	157	35	2	1	1	4	5	94	10	5
%	75	17	1	0	0	2	2	45	5	2
2	8	3	0	0	0	0	1	4	0	0
%	4	1	0	0	0	0	0	2	0	0
TOTAL NUMBERS	209	49	2	1	1	5	7	124	15	5
TOTAL %		23	1	0	0	2	3	59	7	2

CHI SQUARE = 8.08
16 DEGREES OF FREEDOM

GRA. LEVEL

QUES. 10	TOTAL	1	2	3	4	5	6	7	8	9
ITEM B										
0	40	6	1	1	0	1	1	28	1	1
%	19	3	0	0	0	0	0	13	0	0
1	43	10	1	0	0	1	0	29	2	0
%	20	5	0	0	0	0	0	14	1	0
2	93	24	0	0	1	1	4	49	11	3
%	44	11	0	0	0	0	2	23	5	1
3	34	9	0	0	0	2	2	19	1	1
%	16	4	0	0	0	1	1	9	0	0
TOTAL NUMBERS	210	49	2	1	1	5	7	125	15	5
% TOTAL		23	1	0	0	2	3	60	7	2

CHI SQUARE = 23.63
24 DEGREES OF FREEDOM

	TOTAL	1	2	3	4	5	6	7	8	9
ITEM C										
0	94	18	0	1	0	0	3	60	8	4
%	45	9	0	0	0	0	1	29	4	2
1	52	13	2	0	1	4	3	26	2	1
%	25	6	1	0	0	2	1	12	1	0
2	64	18	0	0	0	1	1	39	5	0
%	30	9	0	0	0	0	0	19	2	0
TOTAL NUMBERS	210	49	2	1	1	5	7	125	15	5
% TOTAL		23	1	0	0	2	3	60	7	2

CHI SQUARE = 27.00
16 DEGREES OF FREEDOM

		GRA. LEVEL								
QUES. 11	TOTAL	1	2	3	4	5	6	7	8	9
ITEM B										
0	27	5	1	1	0	0	0	19	1	0
%	13	2	0	0	0	0	0	9	0	0
1	71	16	0	0	1	0	2	45	4	3
%	34	8	0	0	0	0	1	21	2	1
2	6	2	0	0	0	0	0	3	1	0
%	3	1	0	0	0	0	0	1	0	0
3	106	26	1	0	0	5	5	58	9	2
%	50	12	0	0	0	2	2	28	4	1
TOTAL NUMBERS	210	49	2	1	1	5	7	125	15	5
% TOTAL		23	1	0	0	2	3	60	7	2

CHI SQUARE = 23.72
24 DEGREES OF FREEDOM

	TOTAL	1	2	3	4	5	6	7	8	9
ITEM C										
0	43	10	0	0	0	1	1	28	3	0
%	21	5	0	0	0	0	0	13	1	0
1	148	36	2	1	1	4	3	87	11	3
%	71	17	1	0	0	2	1	42	5	1
2	18	3	0	0	0	0	3	9	1	2
%	9	1	0	0	0	0	1	4	0	1
TOTAL NUMBERS	209	49	2	1	1	5	7	124	15	5
% TOTAL		23	1	0	0	2	3	59	7	2

CHI SQUARE = 20.40
16 DEGREES OF FREEDOM

```
                                GRA. LEVEL

QUES.  12      TOTAL     1     2     3     4     5     6     7     8     9

ITEM B
  0              31      4     0     1     0     2     2    19     2     1
%                15      2     0     0     0     1     1     9     1     0

  1              67     19     1     0     0     2     1    42     2     0
%                32      9     0     0     0     1     0    20     1     0

  2              57     14     0     0     0     0     3    31     8     1
%                27      7     0     0     0     0     1    15     4     0

  3              55     12     1     0     1     1     1    33     3     3
%                26      6     0     0     0     0     0    16     1     1

TOTAL NUMBERS   210     49     2     1     1     5     7   125    15     5
% TOTAL                 23     1     0     0     2     3    60     7     2

CHI SQUARE =     28.62
 24 DEGREES OF FREEDOM

ITEM C
  0              84     14     1     0     0     2     3    53     8     3
%                40      7     0     0     0     1     1    25     4     1

  1              82     22     0     1     1     2     3    48     3     2
%                39     10     0     0     0     1     1    23     1     1

  2              44     13     1     0     0     1     1    24     4     0
%                21      6     0     0     0     0     0    11     2     0

TOTAL NUMBERS   210     49     2     1     1     5     7   125    15     5
% TOTAL                 23     1     0     0     2     3    60     7     2

CHI SQUARE =     11.92
 16 DEGREES OF FREEDOM
```

		GRA. LEVEL								
QUES. 13	TOTAL	1	2	3	4	5	6	7	8	9
ITEM B										
0	24	3	0	1	0	1	0	16	2	1
%	11	1	0	0	0	0	0	8	1	0
1	95	27	1	0	1	2	2	54	6	2
%	45	13	0	0	0	1	1	26	3	1
2	19	6	0	0	0	0	1	8	4	0
%	9	3	0	0	0	0	0	4	2	0
3	72	13	1	0	0	2	4	47	3	2
%	34	6	0	0	0	1	2	22	1	1
TOTAL NUMBERS	210	49	2	1	1	5	7	125	15	5
% TOTAL		23	1	0	0	2	3	60	7	2

CHI SQUARE = 25.27
24 DEGREES OF FREEDOM

ITEM C										
0	73	15	1	1	0	0	3	46	6	1
%	35	7	0	0	0	0	1	22	3	0
1	100	21	1	0	1	5	3	64	2	3
%	48	10	0	0	0	2	1	30	1	1
2	37	13	0	0	0	0	1	15	7	1
%	18	6	0	0	0	0	0	7	3	0
TOTAL NUMBERS	210	49	2	1	1	5	7	125	15	5
% TOTAL		23	1	0	0	2	3	60	7	2

CHI SQUARE = 26.08
16 DEGREES OF FREEDOM

		GRA. LEVEL								
QUES. 14	TOTAL	1	2	3	4	5	6	7	8	9
ITEM B										
0	27	6	0	1	0	0	1	18	0	1
%	13	3	0	0	0	0	0	9	0	0
1	86	29	1	0	0	1	1	47	5	2
%	41	14	0	0	0	0	0	22	2	1
2	27	3	0	0	0	0	1	19	3	1
%	13	1	0	0	0	0	0	9	1	0
3	70	11	1	0	1	4	4	41	7	1
%	33	5	0	0	0	2	2	20	3	0
TOTAL NUMBERS	210	49	2	1	1	5	7	125	15	5
% TOTAL		23	1	0	0	2	3	60	7	2

CHI SQUARE = 29.79
24 DEGREES OF FREEDOM

ITEM C										
0	74	14	1	1	0	1	3	46	6	2
%	35	7	0	0	0	0	1	22	3	1
1	89	19	1	0	1	3	3	56	4	2
%	43	9	0	0	0	1	1	27	2	1
2	46	16	0	0	0	1	1	22	5	1
%	22	8	0	0	0	0	0	11	2	0
TOTAL NUMBERS	209	49	2	1	1	5	7	124	15	5
% TOTAL		23	1	0	0	2	3	59	7	2

CHI SQUARE = 11.31
16 DEGREES OF FREEDOM

```
                            GRA. LEVEL

QUES.   15     TOTAL     1     2     3     4     5     6     7     8     9

ITEM B
   0            25     4     0     0     0     0     2    17     1     1
%               12     2     0     0     0     0     1     8     0     0

   1            63    14     1     1     0     1     0    41     4     1
%               30     7     0     0     0     0     0    20     2     0

   2            31    10     0     0     0     0     1    17     3     0
%               15     5     0     0     0     0     0     8     1     0

   3            91    21     1     0     1     4     4    50     7     3
%               43    10     0     0     0     2     2    24     3     1

TOTAL NUMBERS  210    49     2     1     1     5     7   125    15     5
% TOTAL               23     1     0     0     2     3    60     7     2

CHI SQUARE =    16.50
 24 DEGREES OF FREEDOM

ITEM C
   0            69    11     1     0     0     1     3    48     4     1
%               33     5     0     0     0     0     1    23     2     0

   1           105    27     0     1     1     4     4    58     6     4
%               50    13     0     0     0     2     2    28     3     2

   2            35    11     1     0     0     0     0    18     5     0
%               17     5     0     0     0     0     0     9     2     0

TOTAL NUMBERS  209    49     2     1     1     5     7   124    15     5
% TOTAL               23     1     0     0     2     3    59     7     2

CHI SQUARE =    17.55
 16 DEGREES OF FREEDOM
```

						GRA. LEVEL					
QUES.	16	TOTAL	1	2	3	4	5	6	7	8	9
ITEM B											
0		30	7	0	0	0	0	2	19	1	1
%		14	3	0	0	0	0	1	9	0	0
1		82	17	1	1	0	3	1	53	5	1
%		39	8	0	0	0	1	0	25	2	0
2		25	7	0	0	0	0	1	13	4	0
%		12	3	0	0	0	0	0	6	2	0
3		73	18	1	0	1	2	3	40	5	3
%		35	9	0	0	0	1	1	19	2	1
TOTAL NUMBERS		210	49	2	1	1	5	7	125	15	5
% TOTAL			23	1	0	0	2	3	60	7	2

CHI SQUARE = 15.38
24 DEGREES OF FREEDOM

ITEM C											
0		71	12	1	0	0	1	2	48	6	1
%		34	6	0	0	0	0	1	23	3	0
1		111	31	1	1	1	2	4	63	4	4
%		53	15	0	0	0	1	2	30	2	2
2		27	6	0	0	0	2	1	13	5	0
%		13	3	0	0	0	1	0	6	2	0
TOTAL NUMBERS		209	49	2	1	1	5	7	124	15	5
% TOTAL			23	1	0	0	2	3	59	7	2

CHI SQUARE = 17.92
16 DEGREES OF FREEDOM

		GRA. LEVEL								
QUES. 17	TOTAL	1	2	3	4	5	6	7	8	9
ITEM B										
0	29	5	0	1	0	0	1	20	1	1
%	14	2	0	0	0	0	0	10	0	0
1	85	22	1	0	1	0	2	47	10	2
%	40	10	0	0	0	0	1	22	5	1
2	16	4	0	0	0	0	1	10	1	0
%	8	2	0	0	0	0	0	5	0	0
3	80	18	1	0	0	5	3	48	3	2
%	38	9	0	0	0	2	1	23	1	1
TOTAL NUMBERS	210	49	2	1	1	5	7	125	15	5
% TOTAL		23	1	0	0	2	3	60	7	2

CHI SQUARE = 23.46
24 DEGREES OF FREEDOM

ITEM C										
0	75	17	2	0	0	1	1	46	7	1
%	36	8	1	0	0	0	0	22	3	0
1	99	23	0	1	0	4	4	60	3	4
%	47	11	0	0	0	2	2	29	1	2
2	35	9	0	0	1	0	2	18	5	0
%	17	4	0	0	0	0	1	9	2	0
TOTAL NUMBERS	209	49	2	1	1	5	7	124	15	5
% TOTAL		23	1	0	0	2	3	59	7	2

CHI SQUARE = 21.78
16 DEGREES OF FREEDOM

			GRA. LEVEL							
QUES. 18	TOTAL	1	2	3	4	5	6	7	8	9
ITEM B										
0	32	7	0	1	0	0	2	20	1	1
%	15	3	0	0	0	0	1	10	0	0
1	70	19	1	0	0	2	0	43	4	1
%	33	9	0	0	0	1	0	21	2	0
2	51	8	0	0	0	1	3	30	6	3
%	24	4	0	0	0	0	1	14	3	1
3	56	15	1	0	1	2	2	31	4	0
%	27	7	0	0	0	1	1	15	2	0
TOTAL NUMBERS	209	49	2	1	1	5	7	124	15	5
% TOTAL		23	1	0	0	2	3	59	7	2

CHI SQUARE = 23.94
24 DEGREES OF FREEDOM

ITEM C										
0	83	17	1	1	0	1	3	50	7	3
%	40	8	0	0	0	0	1	24	3	1
1	74	16	1	0	1	2	2	48	3	1
%	35	8	0	0	0	1	1	23	1	0
2	53	16	0	0	0	2	2	27	5	1
%	25	8	0	0	0	1	1	13	2	0
TOTAL NUMBERS	210	49	2	1	1	5	7	125	15	5
% TOTAL		23	1	0	0	2	3	60	7	2

CHI SQUARE = 10.08
16 DEGREES OF FREEDOM

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                          GRA. LEVEL

QUES.  19     TOTAL    1     2     3     4     5     6     7     8     9

ITEM B
   0             32    6     1     1     0     0     3    19     1     1
%                15    3     0     0     0     0     1     9     0     0

   1             75   22     0     0     0     0     0    46     6     1
%                36   10     0     0     0     0     0    22     3     0

   2             33    5     0     0     0     1     4    19     4     0
%                16    2     0     0     0     0     2     9     2     0

   3             70   16     1     0     1     4     0    41     4     3
%                33    8     0     0     0     2     0    20     2     1

TOTAL NUMBERS   210   49     2     1     1     5     7   125    15     5
% TOTAL               23     1     0     0     2     3    60     7     2

CHI SQUARE =    39.08
 24 DEGREES OF FREEDOM

ITEM C
   0             68   14     0     1     0     0     5    42     5     1
%                33    7     0     0     0     0     2    20     2     0

   1            105   25     2     0     1     4     0    63     6     4
%                50   12     1     0     0     2     0    30     3     2

   2             36   10     0     0     0     1     2    19     4     0
%                17    5     0     0     0     0     1     9     2     0

TOTAL NUMBERS   209   49     2     1     1     5     7   124    15     5
% TOTAL               23     1     0     0     2     3    59     7     2

CHI SQUARE =    18.81
 16 DEGREES OF FREEDOM
```

		GRA. LEVEL								
QUES. 20	TOTAL	1	2	3	4	5	6	7	8	9
ITEM B										
0	39	6	1	1	0	0	1	27	2	1
%	19	3	0	0	0	0	0	13	1	0
1	77	17	1	0	1	2	1	46	8	1
%	37	8	0	0	0	1	0	22	4	0
2	43	15	0	0	0	0	1	24	3	0
%	20	7	0	0	0	0	0	11	1	0
3	51	11	0	0	0	3	4	28	2	3
%	24	5	0	0	0	1	2	13	1	1
TOTAL NUMBERS	210	49	2	1	1	5	7	125	15	5
% TOTAL		23	1	0	0	2	3	60	7	2

CHI SQUARE = 27.69
24 DEGREES OF FREEDOM

ITEM C										
0	88	19	0	1	C	1	3	56	7	1
%	42	9	0	0	0	0	1	27	3	0
1	75	16	2	0	1	4	3	43	2	4
%	36	8	1	0	0	2	1	20	1	2
2	47	14	0	0	0	0	1	26	6	0
%	22	7	0	0	0	0	0	12	3	0
TOTAL NUMBERS	210	49	2	1	1	5	7	125	15	5
% TOTAL		23	1	0	0	2	3	60	7	2

CHI SQUARE = 21.76
16 DEGREES OF FREEDOM

(This model of a systematic approach to long-range planning in school systems is the result of analyzing and synthesizing planning techniques in numerous governmental, business, and industrial enterprises. See page 80 for listing of long-range planning interviews.)

A PROCESS FOR LONG-RANGE PLANNING IN SCHOOL SYSTEMS

I. PERSONNEL

Top Administration:	Fundamental support for LRP must be clearly evident in the actions as well as the pronouncements of the superintendent. The superintendent initiates the process, motivates planning, insures necessary organizational flexibility for effective long-range planning, and supports and implements the planning decisions.
Planning Board:	The membership of this body should cut across organizational lines in order to avoid planning which is too narrowly oriented. The "Planner" serves as chairman of this body. Staff representation ideally will include some classroom teachers, principals, coordinators, as well as representation from central office administrative staff. In addition, lay members from the community should periodically meet with this group. There should probably be no more than ten to make a workable board.

Task Force:

As specific areas for long-range planning are identified, the LRP Board (or the Planner) assigns responsibility for the development of a particular plan to a task force. Several task forces will be functioning simultaneously. The number of task forces will be limited by the size of the school district and the nature of the topics being studied. Probably three, four, or five task forces, at least, would be involved. These are long term working units and the members ideally should be able to put in several weeks of concentrated work during the summer - without the need to be carrying on their regular individual school-year assignments. Topics assigned to a task force should meet these general criteria:

a) The area studied should be only a portion of the total LRP, but sufficiently broad in scope to warrant consideration by a planning group of several persons.

b) The areas to be studied by task force groups should be identified as the several major subdivisions, of the total LRP, which appear to constitute integral planning topics.

c) The areas studied should be developed by the task force in regard to all the planning aspects involved (e.g. curriculum implications, personnel aspects, budgeting and finance, facility needs, etc.). This is generally called the "task force" approach in contrast to the "functional" approach which assigns separate functional areas of a plan to various specialists for development.

In most, if not all, cases the chairmen of the various task forces are members of the long-range planning board. Other members of the task force staff will include various administrative, teaching and special faculty members as deemed appropriate for the planning task under consideration.

II. INITIATING PLANNING

A. Initially the superintendent may serve as the prime "planner" in the sense that he stimulates the planning efforts of others (particularly through the LRP Board and its task forces).

B. Early development of planning efforts may be enhanced by providing for a consultant to assist in the organization of the planning program and to offer periodic guidance and leadership for the LRP Board.

C. The long-range planning process ideally becomes an integral, internal, and central part of the system's administrative and educational process.

D. Organization for LRP ultimately should provide for a "Planner." This may be a full-time position or a major part-time assignment for one of the top administrative staff members. Such a planner should work directly with the superir tendent and also serves as chairman of the LRP Board. This person should be an experienced, respected administrator---in order to successfully accomplish the task of motivating others to plan. His role is not to do the planning, but to stimulate planning by others and to coordinate their planning efforts.

E. A small staff unit (possibly an assistant and secretarial/ clerical persons) should assist the LRP Board and the Planner.

III. MAJOR STEPS IN LRP

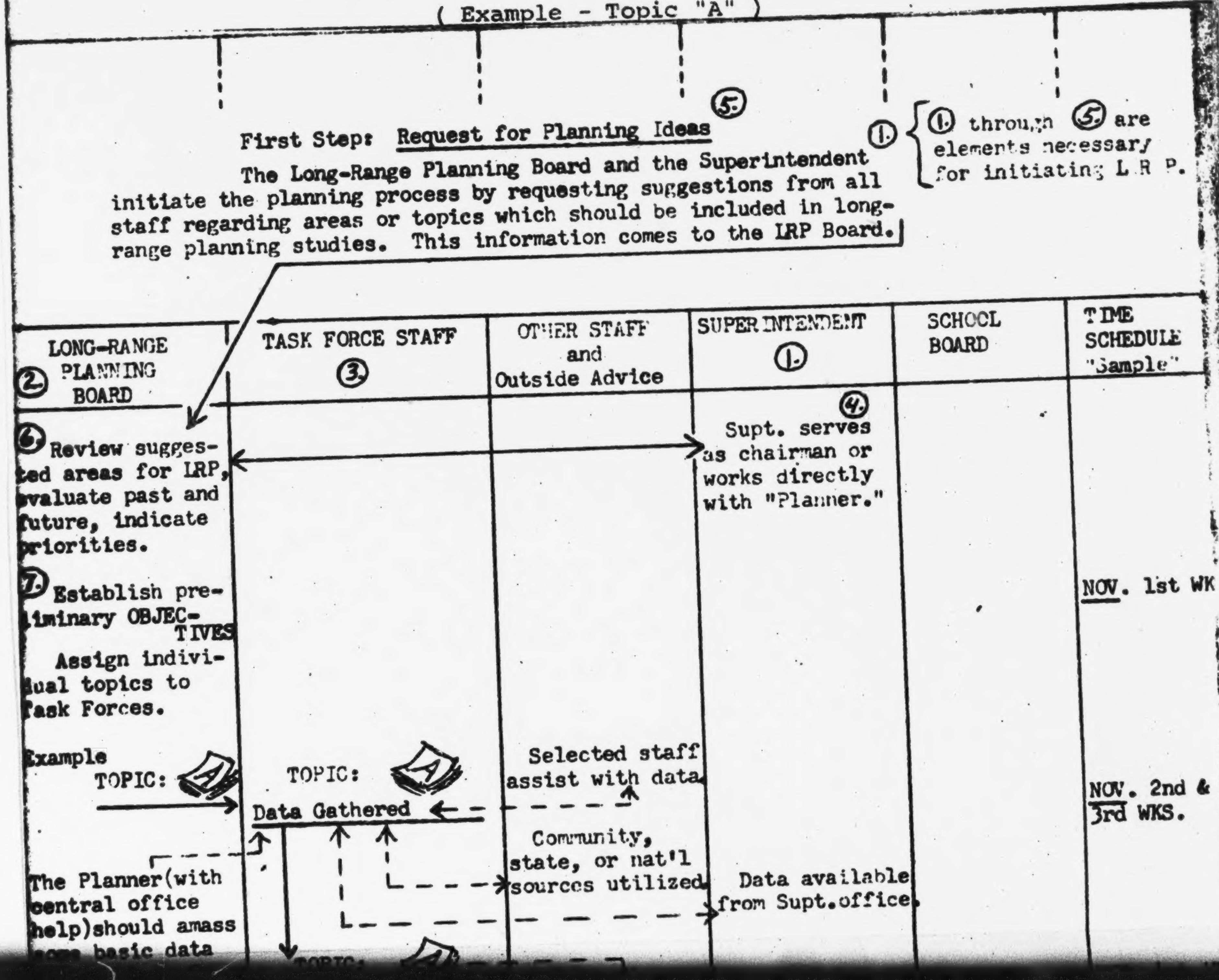
1. Request for Planning Ideas	A "planning letter" -- or similar procedure -- is utilized to alert various levels of the school system to the organizational arrangements for LRP. Certain major planning issues are suggested and members of line and staff at all levels are invited to indicate areas which they feel should be studied as part of the long-range planning program.
2. Basic Review	Included evaluation of past and estimate of future in regard to: curriculum, enrollment, resources, personnel, organization, and environmental and societal conditions (community, state, nation, and world.)
3. Preliminary Objectives	General areas needing long-range planning are identified on the basis of steps 1 and 2 (above). Preliminary objectives are indicated.
4. Analysis	Topics assigned to Task Forces. Each task force has responsibility for the over all development of a plan in a particular area. This includes the plan's implications for curriculum, staff, plant,

	budget, and other necessary components.
5. Develop Plan & Phasing of Program	Specific time schedules are set for each individual plan and for the total LRP. Allocation of responsibility is indicated and step-by-step details are shown for the first 18 months of the plan. More general outlines are projected for the five, eight, or ten year period.
6. Action Plans Adopted	Action plans given final review and revision by the LRP Board, after which they are submitted to the School Board. Board action will involve: a) adoption of necessary policies b) approval of LRP
7. Operations	The "doing" or implementation of the plans.
8. Evaluation	Progress reports and use of periodic measurement tools assist in the on-going evaluation of the LRP. Such evaluation will require the use of both product reports (such as comparative analysis of achievement test results, college success, drop out figures, etc.), and process reports (such as teacher quality, comparative educational expenditures, planning progress, etc.).
9. Updating and Replanning	The plans in specific areas as well as the total school system long-range plan will include both short and long-range aspects. At a given point (6 to 8 months) after implementation of the long-range plans the planning board and its task force units will update

the LRP by revising the future objectives in light of the first half year or year's experience. At this same time it will be necessary to describe further detailed plans for the next 12 to 18 months. Such a process assures a living LRP which is constantly moving ahead from a current date.

DEVELOPMENT PROCESS FOR ONE SEGMENT OF A LONG-RANGE PLANNING PROGRAM

(Example - Topic "A")



First Step: Request for Planning Ideas ⑤

The Long-Range Planning Board and the Superintendent initiate the planning process by requesting suggestions from all staff regarding areas or topics which should be included in long-range planning studies. This information comes to the LRP Board. ①

① through ⑤ are elements necessary for initiating L.R.P.

② LONG-RANGE PLANNING BOARD
TASK FORCE STAFF ③
OTHER STAFF and Outside Advice
SUPERINTENDENT ①
SCHOOL BOARD
TIME SCHEDULE "Sample"

⑥ Review suggested areas for LRP, evaluate past and future, indicate priorities.

⑦ Establish preliminary OBJECTIVES

Assign individual topics to Task Forces.

④ Supt. serves as chairman or works directly with "Planner."

NOV. 1st WK

Example TOPIC: A

TOPIC: A

Data Gathered

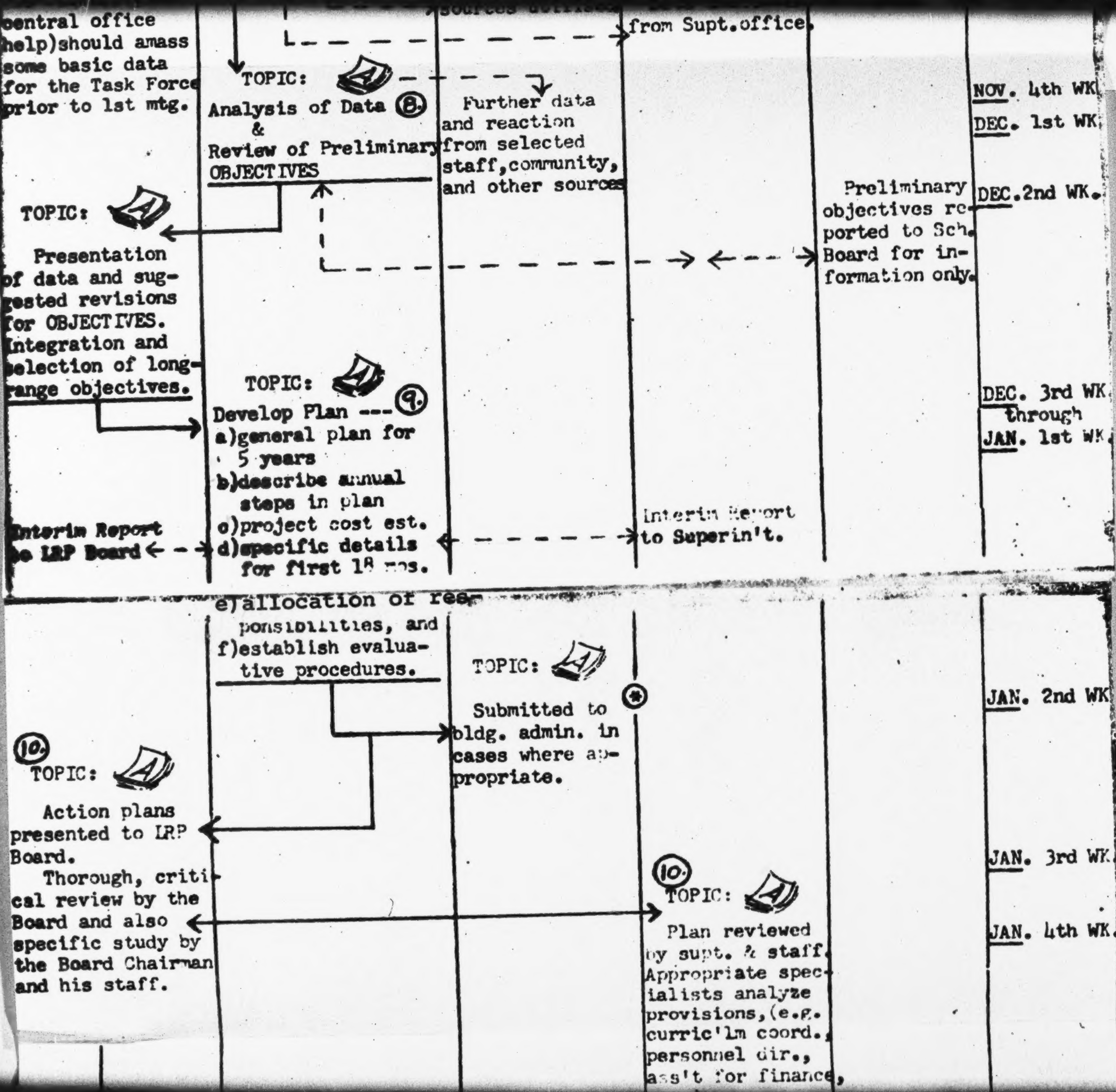
Selected staff assist with data.

Community, state, or nat'l sources utilized.

Data available from Supt.office.

NOV. 2nd & 3rd WKS.

The Planner (with central office help) should amass some basic data



central office help)should amass some basic data for the Task Force prior to 1st mtg.

TOPIC: Analysis of Data ⑧ & Review of Preliminary OBJECTIVES

sources utilized

Further data and reaction from selected staff, community, and other sources

from Supt.office

NOV. 4th WK.
DEC. 1st WK.

TOPIC: Presentation of data and suggested revisions for OBJECTIVES. Integration and selection of long-range objectives.

Preliminary objectives reported to Sch. Board for information only.

DEC. 2nd WK.

TOPIC: ⑨ Develop Plan ---
a)general plan for 5 years
b)describe annual steps in plan
c)project cost est.
d)specific details for first 18 mos.
e)allocation of responsibilities, and
f)establish evaluative procedures.

DEC. 3rd WK. through JAN. 1st WK.

Interim Report to LRP Board

Interim Report to Superin't.

TOPIC: Submitted to bldg. admin. in cases where appropriate.

*

JAN. 2nd WK.

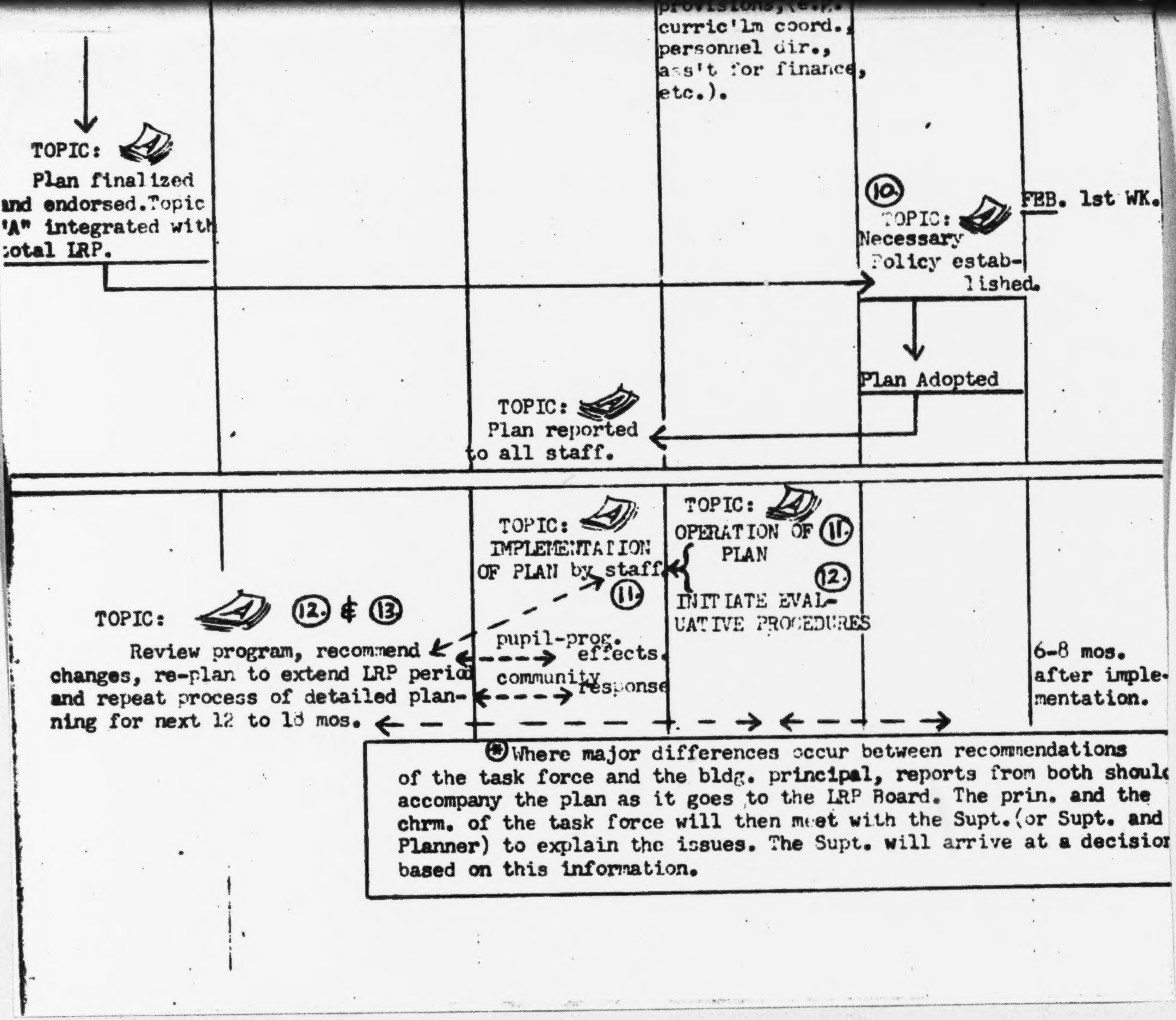
⑩ TOPIC: Action plans presented to LRP Board.

Thorough, critical review by the Board and also specific study by the Board Chairman and his staff.

JAN. 3rd WK.

⑩ TOPIC: Plan reviewed by supt. & staff. Appropriate specialists analyze provisions, (e.g. curric'lm coord., personnel dir., ass't for finance,

JAN. 4th WK.


provisions, (e.g.
curric'lm coord.,
personnel dir.,
ass't for finance,
etc.).
TOPIC:
Plan finalized
and endorsed. Topic
"A" integrated with
total LRP.
⑩
TOPIC:
Necessary
Policy estab-
lished.
FEB. 1st WK.
Plan Adopted
TOPIC:
Plan reported
to all staff.
TOPIC:
IMPLEMENTATION
OF PLAN by staff
⑪
TOPIC:
OPERATION OF
PLAN
⑪
⑫
INITIATE EVAL-
UATIVE PROCEDURES
TOPIC:
⑫ & ⑬
Review program, recommend
changes, re-plan to extend LRP period
and repeat process of detailed plan-
ning for next 12 to 18 mos.
pupil-prog.
effects.
community
response
6-8 mos.
after imple-
mentation.

⊛ Where major differences occur between recommendations of the task force and the bldg. principal, reports from both should accompany the plan as it goes to the LRP Board. The prin. and the chrm. of the task force will then meet with the Supt. (or Supt. and Planner) to explain the issues. The Supt. will arrive at a decision based on this information.

INTERVIEWS AND MEETINGS IN REGARD TO GOVERNMENTAL OR INDUSTRIAL LONG-RANGE PLANNING

(The following lists those persons interviewed, various meetings attended, and institutions visited which provided data for a planning process.)

American Public Welfare Association

Columbia University Graduate School of Education
    Dr. E. Kirby Warren

American Cyanamid Co., Stamford, Connecticut
    Dr. George Rayer
    Mr. Bruce Watson

Maxwell Graduate School of Citizenship
    Dr. Alan K. Campbell
    Dr. Seymour Sacks

Kodak Co., Rochester, New York
    Mr. Gordon H. Tubbs

Xerox Corp., Rochester, New York
    Mr. Phillip Hyatt

American Management Assoc., New York, N. Y.
    Mr. Robert N. Carpenter

Bureau of the Budget, Washington, D. C.
    Mr. Roger W. Jones
    Mr. Peter Szanton

The State Department, Washington, D. C.
    Mr. Richard W. Barrett

The Department of Defense, The Pentagon
    Dr. Victor Heyman

The Brookings Institution, Washington, D. C.
    Dr. Stephen K. Bailey
    Dr. Kermit Gordon

Department of Housing and Urban Development, Washington, D. C.
Mr. Warren Zitzman

Department of Commerce, Emergency Transportation, Washington, D.C.
Mr. John L. McGruder

Stanford Research Institute, Menlo Park, California

The Rand Corporation, Santa Monica, California

DETERRENTS TO LONG-RANGE PLANNING

(These are some of the personal comments which were made by school superintendents in reply to the last open-ended item on page 7 of the questionnaire.)

Mr. Ralph A. Austermiller
Burlington, Iowa

"Have just started long range planning. None was done until last year. Wait and see."

Mr. Lowell C. Rosen
Kokoma, Indiana

"The immediate problems are so great that it is difficult to look beyond immediate needs."

"The changing nature of education makes target identification difficult."

"Needed: The assignment of a staff individual or a staff team to provide continuous long range planning. Correspondingly specific time periods should be allotted for consideration of such plans."

Dr. Lester B. Ball
Oak Park, Illinois

1. "Community fear of social and economic change as our town, an old suburb, changes."
2. "Fear of integration of Negroes. Not yet a real problem, but one ahead. There is an almost psychotic fear in this area, and it is the 'hidden agenda' in anything we do."
3. "Right-wing pressure, related to the above, but also

using the above to instigate school change, social inter-action, or anything 'liberal'."

4. "A falling economic base on which to support a traditionally high cost school program."
5. "Help needed -- wisdom, forbearance, understanding, and damn strong emotional powers."

Dr. Robert H. Metcalf
Lake Forest, Illinois

"Kind of help. I don't know! Only recently I heard of the involvement of T. C. with the Darien, Connecticut, schools in this area. My impression was that this is one of the first attempts to get at the broader aspects of long-range planning. I suppose that the kind of help needed is an agency, such as T. C., to assist school districts or training programs, pre-service, or seminars, and in-service for chief administrators or others designated to carry on such programs."

Superintendent of Schools
Highland Park, Illinois

"We do not have a specific person on our administrative staff who is charged with the responsibility."

"Also, we have just started to develop long-range plans. We have not been able to set up sound procedures yet."

"Help needed: more readiness on part of other government and civic bodies to provide help."

"Also, a particular person on the staff to be charged with this responsibility."

Superintendent of Schools
Glencoe, Illinois

"Principal problem is time."

"Need more staff help to collect and help interpret data. Could use someone just to keep up with the new Federal programs, and to answer all of the questionnaires that come in (I mean that seriously, for I receive an average of three to four per week, and they reduce my time for activities, I consider of prime importance). In fact, I don't answer most of them."

Mr. Rulon M. Ellis
Pocatello, Idaho

1. "Lack of a good financial basis."

2. "Lack of adequate time for planning."

3. "I would like to have available the services of a person skilled in planning who could work in a consultant capacity."

Dr. Myron L. Ashmore
Fort Lauderdale, Florida

"As badly as more financial support is needed, the red tape, indecision and lack of understanding of local level problems by Federal Personnel is causing consternation and disappointment in the use of Federal Funds for education."

Dr. Thomas F. Carey
New York
Jericho, Long Island

"The necessary but time-consuming preoccupation with the problems of the moment."

"The difficulty in bringing the entire local educational leadership team together on a regular basis for projective "think sessions" of sufficient duration."

"The development of a "conscientiousness" on the part of the "building level" administrator that he must nurture the concept of the "long view" of the educational goals and not leave such thinking exclusively within the purview of central staff members."

"The need to develop a sense of local priority and subsequent commitment on the part of board, staff, faculty and community so that long-range goals can be identified and ultimately realized with a minimum of false starts and futile interruptions."

"The 'I'd rather do it myself' attitude on the part of too many district administrators must be modified if the financial and human resources of the individual school system are not to be dissipated with 'short range' local endeavors while the 'long range' educational needs of children go unresolved."

Mr. S. R. Clark
Cheyenne, Wyoming

"The new federal funding, although welcome, has an undesirable side-effect: the money becomes available quickly and a school district needs to devise a project to fit the spirit of the enabling act, not necessarily the prescribed long-range planning schedule of the district."

"As we become more familiar with federal funding it should be possible to better phase these opportunities into our own schedule of plan implementation."

Mr. John Charles Prasch
Racine, Wisconsin

"Our school district embraces five municipalities (one city, two villages, two townships each having its own governmental organization)."

"Overall planning of the physical plant is hampered by a lack of consistent regional planning with respect to zoning, development of streets, sewer and water services, etc..."

"Manpower shortages and turnover of key personnel have hampered the implementation of long-range planning."

"Federal funds, though welcome, have interrupted or changed plans by necessitating shifts to meet the requirements for eligibility or guidelines. The 'grantmanship' game requires that we warp the plans to fit the kinds of programs currently favor."

"The help we most need is staff that has planning time. Our entire operation is much too oriented toward meeting the day to day crisis and has far too little time for thinking ahead."

"Generally speaking we are helplessly understaffed. The general public does not understand or appreciate this. For that matter, neither do the departments of education at the University level seem to appreciate the degree to which schools are understaffed. New fiscal capability in the form of Federal Aids fails to remedy this basic problem because they demand a flurry of new activities, repairing, and evaluating for any staff additions made."

Mr. Fred E. Breit
Seattle, Washington

Problem: "The nature of the long range objectives, their scope, their educational, social, economical, logistical dimensions."

Help: "We need the assistance of the very best experts to help us delineate the dimensions of the problem. Ex: What are the meanings of the above areas for education in an urban environment? How should urban schools be organized to meet the problems in the 70's, 80's, 90's? What will be the community commitment? What are the social expectations of public education?"

"Could Columbia University bring together a group of six or seven leading educators, architects, sociologists, anthropologists, etc. in a team which could work with us in our own setting to carve out, in rough form, the shape of urban education during the next three decades?"

"Long-range planning must be measured in longer terms because the changed innovations will be vast, costly and complex. They will require new specifications not only for the educational establishment but for local, state and federal institutions."

Dr. Richard R. Short
Hastings, Nebraska

"Basic problem stems from communication. If interested groups could communicate one with another the problems would be small. This lack of communication is not because of a lack of a desire to communicate. Each agency becomes interested in its own long-range plans and objectives of other civic agencies."

Dr. Charles Thomas St. Clair, Jr.
Huntington, Long Island
New York

"Long range planning has been both essential and common in school systems with which I worked over many years. It has been done often with naivete and we have been badly fooled by singles in the birth rate and other factors of growth which have typically been underestimated, especially in suburban areas."

Source of the problems:

1. A tendency to predict more certainly than is possible. We get carried away by mathematical computors to the third decimal.

2. A reluctance on the part of many citizens to accept plans unless prepared by "experts" or "consultants", often less capable than staff members.

3. Inadequate staffing on the part of the school district and cooperating agencies. Planning too often is a minor assignment for very busy people.

4. Deferment of implementation of the plans often occurs because of budgetary or political complications.

5. Changes in personnel in the various agencies and in officials included, often has a deterrent or variant effect.

"Improved consultant services by private corporations, university field services, etc..."

"Better central office staffing in school systems and other public agencies."

Dr. Thomas E. Woods
Beaverton, Oregon

"This is all one man's opinion. I think we lack vision. We don't have any idea what the world is like or what things are going to be like in the near future. What is even worse is the fact that we're not concerned."

"The boys and girls in our classrooms will be citizens, producers, parents, and leaders in the year 2000. What type of education do they need to prepare for these responsibilities? It takes a fairly sophisticated professional to think these thoughts."

"Professional administrators need to be a lot sharper than they are. They operate too much from the 'nuts and bolts' level and are deficient in their knowledge of theory, principles, etc. We are the only field in administration that doesn't have a body of theory to operate from. We are gradually starting to get it. With theory one can make plans and predictions over a period of time. Without it, one operates on a day to day, contract to contract basis."

"Let me put it another way. Most administrators organize and manage the operation. They do not build into the school district effective mechanism for change. With their limited knowledge base, they don't know what changes need to be made. They use very little discretion in selection of changes to be made. They hop on the bandwagon and follow fads. Furthermore, most of us are unable to measure the effects of any change we do make."

"There may be too many 'nice guys' in school administration who aren't too bright or too knowledgeable. As a starter, school administrators need to be more sophisticated in the behavioral and social sciences. They need to have a better understanding of what little administrative theory we do have. Finally, they need a better knowledge of change and innovation--how it occurs, how it spreads, conditions necessary for change, etc."

"Most school administrators get by with being organizers and managers. This is necessary but not sufficient. They need to be scholars, communicators, and instructional leaders."

Dr. Ross M. Gill
Elkins Park, Pennsylvania

"I find it difficult to secure outstanding principals for educational leadership roles. Few demonstrate qualities needed for moving into central office positions. The superintendent's staff is too involved in necessary trivia of filling out forms and complying with state and federal requirements."

Mr. W. Henry Cone, Superintendent
Anderson, South Carolina

Greatest Problem:

1. "Staff too old; too entrenched in a school philosophy appropriate to an earlier day."

2. "Retire a couple of key people; replace them with younger men with high growth potential; educate these new fellows over a three to five year period through local work: sabbatical leave; special studies; etc."

CONCLUSION AND RECOMMENDATIONS

Neither systematic long-range planning nor a formalized structure for insuring an effective planning effort are to be found in most school systems today.

There is clear evidence, on the other hand, in the literature of public and corporate management that long-range planning techniques have been developed in government and business over a period of years and have increasingly become a formalized part of the management process. Visiting and observing industrial and government planners verifies the existence of the long-range planning practices referred to in the planning literature.

Public school leaders, though not presently satisfied with their planning efforts, express a growing awareness of and interest in new approaches to the task of long-range planning. Lack of time and personnel for planning emerge as the two most frequently cited obstacles in the path of planning progress, after the basic problem of lack of funds.

In addition, responses to questionnaires in this study suggest that there is also a lack of rationale for planning or the "how" of planning. A contradiction evident in current school district planning efforts is that apparently where there are detailed long-range plans there generally have not been previously written long-range objectives.

Approaches to systematic L R P found in industry and government have application to public school planning. Using a combination of staff, administrative, and lay committees a viable school-community planning structure can be provided.

Based on the frequency with which five years was referred to in questionnaire responses to the item "long-range plans for how many years?" it would seem that increasingly districts are looking ahead for at least five years. Furthermore, planning literature refers to ten year planning periods as realistic for industry and government. A range of five to ten years for school district long-range planning is likely to emerge as more sophisticated planning processes are developed in school systems.

The planning function in the schools is currently performed by staff with multiple responsibilities. Today the Director of Instruction and the Director of Business are cited most often as having key responsibility, along with the Superintendent, for L R P. Only 1½% of the Districts in this study reported having personnel with a title such as Director, Coordinator, or Assistant Superintendent for Planning. Effective planning programs require the leadership of one or several skilled planners, and the outline for systematic L R P described in this study calls for personnel who perform a specific planning function.

In general, the questionnaire results, the interviews, the literature and open-ended reaction of school leaders all point to the necessity for organized long-range planning efforts. There is willingness evident among school leaders to seek more imaginative approaches to planning. With growing planning expertise in various fields, cooperation between industry, business government, public education and higher education is called for. In addition to applying some of the techniques of L R P from other areas to public schools, the very process of vital interaction between schools and other sectors of the economy will itself result in more meaningful long-range planning for public education. It would be fruitful to pursue further, through other studies and through practical experimentation in the field, the means whereby cooperative interaction between schools and corporate and government enterprises can enhance the planning effort in school systems.

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